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THE GRAIN SITUATION;

A Paper Read to Student Officers at
the Industrial College of the
Armed Forces, Fort McNair,
Washington, D. C.,
September 17, 1948.

by

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The U. S. Situation

1948 a Banner Year

The grain situation in the United States, supply wise, is excellent. In fact, grains already harvested or in prospect will reach an all time high in 1948 of 150 million long tons.1/ This tonnage is 25 percent above the relatively poor harvest of last year, 51 percent above the average harvest of 1935-39 and 7.7 percent above our previous record year of 1946. Furthermore, supplies are well balanced and are relatively best for the grains we need most--corn and wheat. (Table 20 and Chart, page 36.)

There is no prospective shortage of any single grain in this crop year. Supplies this year will permit full utilization domestically for all uses, most important of which is a marked increase in livestock, dairy and poultry production, and also enable the United States to export at unprecedented rates, limited only by ability of claimants to pay and the physical capacity to move grain and grain products into export channels unless other factors should dictate smaller exports. Maximum physical exports probably cannot exceed 20 million tons in this crop year. If that amount were exported, this harvest would still supply 130 million tons for domestic use--about 4 percent more than from any previous harvest. However, smaller domestic usage in this crop year than in years of previous high production (because of low livestock numbers resulting from last year's short feed supplies) means that stocks will be increased materially--possibly to near the record levels experienced in the 1938-42 period.

This situation means lower prices for grains than in the immediate past, with certain price-support problems. It also creates a major storage problem to assure the conservation of the entire crop. However, these problems are minor in comparison with the hardships

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1/ All 1948 production data are based upon August 1 Crop Report. The September 1 report shows no significant change from the August report.

endured by this nation, and the world generally, as a result of the lack of these reserves in recent years when breadgrain exports to needy people were limited by the bountifulness of our harvests, and our livestock production fluctuated in almost direct proportion to the ups and downs of yearly feed grain harvests. (Table 1.) The maintenance of more adequate grain reserves, particularly for feed grains, than has been experienced for four or five years is essential to a safe and stable food supply in this country under present world conditions and levels of economic activity.

Individual Grains in 1948

So far, attention has been given to the overall grain situation. The situation for individual grains is shown separately in Tables 2 through 8, and in Charts, pages 38, 39, and 40. The outstanding items of interest for individual grains is the fact that the 1948 corn harvest, estimated at 3.5 billion bushels is a record crop, being 46 percent larger than the 1947 harvest and 51 percent above the average harvest of 1935-39. Wheat production at 1,284 million bushels is second only to the 1,365 million bushels harvested in 1947, and is 69 percent above the 1935-39 average. Oat production in 1948 is 21 percent above 1947 and 41 percent above 1935-39. Barley production is up about one-eighth from last year and almost one-third above prewar. Rye production is trending downward and is now rather unimportant in the United States. Rice production will reach a new record in 1948, being slightly above 1947 and one-half above prewar.

Why Bumper Crops in 1948?

How did we get such a favorable supply situation for grains this year? Was it a result of the high prices of last year (Chart, page 41), expanded acreage, a supreme effort on the part of farmers? These were important factors, but it appears that the all-around favorableness of all conditions in 1948 is the prime cause. The acreage of the breadgrains (wheat and rye)was 2 million acres less than 1947, and the acreage of coarse grains was up only 5 million or 3.6 percent, a small increase compared to the 38-percent increase in production. Moreover, the coarse grain acreage in 1948 is a million acres less than was harvested on an average during the last 12 years. (Table 2.) So, favorable yields are the major contribution, particularly for coarse grains. Every grain except rice is yielding higher in 1948 than in the 10-year average period of 1937-48. Wheat yields are one-eighth higher. The striking increase, however, is in corn, for which 1948 yields were indicated on August 1 to be 28 percent above the average for the most recent 10-year period. Whereas corn yields of about 28 bushels per planted acre were common in the late 30's, the comparable figure in 1948 is 40.4, or 45 percent higher. Ideal corn producing weather has been a major cause of this high indicated yield,

but of great significance this year and increasingly important in recent years is the use of higher-yielding hybrid seed which yields about one-fourth more than open pollinated seed. The increase in use of hybrid seed is shown in Table 9, together with yields of corn. In 1935 only 1.1 percent of the corn acreage was planted to this improved seed, by 1940 it was 30 percent, by 1945, 64 percent; and this year it is 75 percent. It is easy to see the correlation between the use of hybrid seed and yield per acre of corn. However, there are other contributing factors--the weather, increased use of conservation practices such as those sponsored by the Department of Agriculture through its action programs, the improved tillage which has come with increased use of tractor power, and the increased use of fertilizers and limestone in the more humid areas.

With wheat, there has been an increased use of higher-yielding and disease-resistant varieties, and much improvement in use of moisture-conserving practices during the 12 - 15 years that the Department has conducted action programs in the field of soil conservation. But improvement in rainfall in the critical growing period has been a major factor in higher yields and low acreage abandonment of wheat in recent years. There has been considerable improvement of oat varieties recently, bringing higher yields in the old established oat areas and making oats more adapted to wider areas of growth, particularly the South. Use of chemical weed controls is contributing some to improved yields, particularly in rice, and is fast spreading to the other grains.

Utilization of Our Grains

Time does not permit making a detailed examination of the utilization of the grain supplies. However, Tables 3 through 8 show for each grain the supplies and utilization over a long period of years. (Still more detailed information may be found in the distribution tables included in Feed Statistics, particularly for corn which is used industrially more than any other grain.) Generally speaking, for the grains as a whole, livestock is the largest claimant, followed by domestic use for human food. From supplies of 7.6 billion bushels of all grains now estimated to be available in 1948-49, it is estimated that on a bushel basis utilization will be about as follows: 55 percent for feed, 11 percent for food, 8 to 10 percent for exports, 3 percent for seed, 1 percent for industry, and 20 to 22 percent held in stocks, of which 10 to 12 percent will be newly added. Examination of the data through the years shows little variation in quantities used for food, but wide variations in other uses. The proportion of the supply being exported probably varies most widely. This picture can be seen best for the various grains for the past 15 to 20 years from the individual grain tables. (Tables 3 through 8, Charts, pages 42 and 43.)

U. S. Grain Exports

Wheat exports have varied from 7 million bushels in 1935 to 485 million this past year, and this could be exceeded in 1948-49. Corn exports have varied from none upward to 140 million bushels. Frequently we import more oats and barley than we export--these imports coming mostly as high quality milling oats and malting barley from Canada. Rice exports have trebled since prewar.

Omitting rice, and grouping the breadgrains and the coarse grains, our recent export performance in relation to average prewar years can be seen best from Table 10 and Charts, pages 44 and 45. Our prewar export rate of one million long tons of bread grains has been increased to almost 13 million tons in 1947-48, while total exports from all sources have increased from about 15 to 26 million tons. Prewar, our share of world trade in wheat and rye was only 6 percent but it was 45 percent in 1945-46, 52 percent in 1946-47 and 49 percent in 1947-48.

Performance in coarse grains is not quite so impressive. Prewar exports of 1.1 million long tons, equalling 9 percent of the total world trade, were increased to 4.1 million in 1946-47 or to 53 percent of world trade. The short corn crop of 1947 necessitated holding exports to 2.1 million tons in 1947-48. In fact, exports in all the postwar years through 1947-48 have been restricted, because of high requirements at home, to those coarse grains and their products which would be used for direct human food.

Summarizing for all grains except rice, prewar exports of 2.1 million tons, amounting to 7 percent of world trade, were increased to about 15 million tons in the past two years, reaching approximately one-half of the total world trade.

The World Situation

Why the Growth of World Grain Movement?

Why have our exports expanded so much? There are several reasons, but most are associated with the war and postwar developments. (See Charts, pages 46 and 47.)

Large Rice Deficits

First the rice situation needs to be examined. From Table 11 it will be seen that for the world, excluding Russia, rice production is slightly below prewar levels, even though the area of production is enlarged. Still more important, it will be noted from Table 12 world trade in rice was only 2.2 million metric tons in 1947 compared to 8.3 in 1934-38. This picture is darkened further when it is realized that population increases and other pressures have meant that those countries producing rice in a major way have consumed it instead of selling in a prewar manner. (Charts, pages 48 and 49.) This situation has meant that wheat and other grains have had to be substituted for rice in many rice-eating areas of the world, particularly India, Japan, the Philippines, Ceylon, and even China and most European countries. This has added several million tons to the demand for other grains to move in world trade, and it is a demand which may continue for several years if purchasing power is available. In this connection, it must be recognized that this country is furnishing that purchasing power for 1.5 to 2.0 million tons of this grain in our Occupied Areas of the Pacific. India's current requirements approximate 2.5 - 3.0 million tons exclusive of rice, whereas she was an exporter prewar.

Wartime Prosperity

Another important factor is the higher purchasing power of many of the countries of the world that averted the high costs of war but were able to market their products to good advantage, or otherwise found themselves beneficiaries of an easier foreign exchange situation. Prosperity meant larger rations and in many countries it meant flour instead of other lower quality foods.

Population Growth

Not to be overlooked is the growth of population during the past decade. (Table 13 - Chart, page 50.) It is estimated that world population has increased by 200 million people since 1939--an increase of 8 percent, with further increases predicted--by one-eighth in fact, in the 14 years 1936 to 1950. This increase is variously distributed, of course, but no small share of it has come in the grain deficit areas of the world. If prewar rations per

capita were to be maintained and grain continued to hold its prewar importance in the ration, then 45 million tons more grain than prewar would be needed today to feed these added people. This accounts for part of the increased world trade in grains since many of these added people are in countries where they can be fed only by imports. In passing, it may be observed that rations obviously have not been maintained, for total supplies have been under prewar by 20 to 60 million tons in the past three years, equalling only 85 percent of requirements by the above standard in 1947-48. (Table 14.)

Effect of War in Europe and Other World Disturbances

Of much and possibly of most significance in explaining the large world trade in grains of recent years is the disruption of agricultural production in Europe and in other importing areas.

The Marshall Plan countries excluding Turkey furnish a good picture of the claimant countries of Europe. (Table 15.) Grain acreage in these countries had not quite reached prewar with the 1947 harvest (their worst postwar year) it being 6 percent below prewar. Breadgrains were especially poor, mostly due to bad weather. Breadgrain acreage harvested that year was only 85 percent of prewar. In addition, yields have continued below prewar. The 1946 harvest gave yields of only 95 percent of prewar, even though this was generally considered to be a good crop year. The 1947 yields were worse, being only 77 percent of prewar for breadgrains and 86 percent for coarse grains, or 82 percent for all grains, the worst in a century. Weather conditions have been very favorable for the 1948 crop of breadgrains, but yields still are slightly below prewar. Lack of fertilizers, poor tilth, depreciated equipment, and other factors associated with the war are still taking their toll. Consequently, production of grains has been well below prewar, with the 1947 harvest only two-thirds of prewar for breadgrains and only a little over three-fourths of prewar for all grains. Added to this situation has been the necessity to rely more heavily than before upon grain for direct human food, the difficulties of collection for use in major population areas, and the increased political importance of food. Such low production records, coupled with population increases of 8 percent on the average have brought tremendous pressure to increase imports, particularly of the breadgrains.

Other areas of the world also have suffered crop reverses. For the world excluding the four major exporters, acreage in 1947 was 5 percent below prewar and production down 12 percent. This is in contrast with a 2 percent increase in acreage and a 19 percent increase in production in 1947 compared to prewar for the four big exporters. These are some of the reasons for increased world trade in grain.

Situation in Other Exporting Countries Aided U. S. Exports

Now, why did our share of the world grain trade increase so greatly over prewar? There are many angles to the answer of that question, many of which cannot be discussed in the detail they deserve. Particularly is this true of why we had such a small share of prewar world trade--certainly it was too small in relation to our grain producing ability. It stemmed in part from our own national policies which tended to discourage world trade. This accepted, it may be said that part of the postwar increase was a natural recovery from an abnormal situation. Also of great significance is the fact that our harvests were more than bountiful, largely because of good weather, but also because of our national agricultural program of deliberately expanded production under a system of yearly production goals backed by a government-subsidized conservation program and support prices sufficiently attractive to induce an expanded production. This situation gave us grain for export when others did not have it. (See Tables 10 and 16 through 21.) For a time Canada exported heavily from wartime accumulated stocks, and as late as 1945-46 her exports, mostly of wheat, were double prewar. But, once these stocks were gone, her exports sank to prewar and will be about that in 1948-49. Australia, while being unable to find a market for her wheat in the war years with the result that she, like Canada, sold it to the United States for livestock feed, suffered terrible droughts immediately thereafter, so that of the postwar years only 1947-48 show exports equal to prewar, and 1948-49 will show less.

Argentina, the major prewar exporter of grains, needs special attention. Argentina's acreage is about equally divided between breadgrains and coarse grains, but she was the major exporter of coarse grains prewar and a most important block in the foundation of European livestock production. Also, her bread grain exports prewar were second only to those of Canada. Like other major exporters, Argentina was unable to maintain exports during the war years. A change in national policies made grain marketing a national monopoly associated with prices to farmers which have not been conducive to expanded production when world demand increased. In contrast, prices to claimants have been set in keeping with a full knowledge of the world shortage. Consequently, postwar acreages are 12 to 15 percent below prewar, and only exceptionally good yields gave them a 1947-48 grain production equal to prewar. Moreover, because of price policies, exports have not been equal to availability, with considerable quantities of grain going to waste. Exports in 1945-46 were only 3.9 million long tons compared with 10.7 prewar, increasing slightly to 4.3 in 1946-47. A further increase to 7.0 million tons, still only 65 percent of prewar, was made in 1947-48, largely because of the extremely short crop in Europe, the short corn crop in the United States, the restrictions established by Congress on our wheat exports, and the inability of importers to obtain added grain elsewhere. Currently, however,

Argentine exports are quite small due mostly to the fact that Argentine prices are too high ($4.86 per bushel for wheat) to permit movement in quantity to ERP countries under current policies of the Economic Cooperation Administration. The reduced coarse grain exports from Argentina, which at times has run only one-fourth of prewar, has had a devastating effect upon European livestock production. Lack of these grains has forced liquidation or delayed rehabilitation of herds and flocks, cut food consumption and increased dependence upon grain for food. This has induced farmers to feed their own grains instead of selling, thereby increasing the dependence of metropolitan areas upon imported grains.

Russia (present boundaries) and her satellites made a major although erratic contribution to world grain trade prewar. Part of this grain at times was deliberately exported by Russia to get production goods. Part of it was a regular movement from Eastern Germany into what is now the Western Zones, and part of it was movement from Romania, Yugoslavia, etc., principally as coarse grains for feed, into Western Europe. This movement ended with the war and has scarcely been resumed except possibly into or within Russia.

In addition, most of the grain and soybean production of Northeastern Asia is now under Russian influence and unavailable to normal claimants. Explanation of this situation can be seen in the fact that by 1947 Russian grain acreage had recovered only to 84 percent of prewar and production to but 80 percent of prewar. The 1948 situation is not known definitely, but acreage and production are both reported in the Russian press to be improved over 1947. The satellite countries all show improvement over 1947.

Population growth and poor crop conditions and other factors in other prewar exporting countries such as Turkey, the Middle East, North Africa, Union of South Africa, Brazil, and the Netherlands East Indies have been such that exports from this group, including Russia and satellites, have decreased materially from 7.1 million tons prewar to only about a million tons immediately postwar, with recovery to about 50 percent of prewar in 1947-48.

These are some of the major factors which have changed the United States from the least important to the most important of the major exporters. As a nation we are extremely fortunate that we could make such a contribution to the essential needs of our Allies or friends. It is no half truth that our food won the war, and if the peace is being saved, our food is making a major contribution to it. During the war and postwar period, this country has made a valiant effort to divide its available grains in accordance with need. It is the one country where at any time any claimant could be heard and, if his case were good, he at least could get some needed grain. Our grain has been a major factor in turning the tide in more than one country, and this has been at

considerable cost to this nation, particularly of recent years when exports have been maintained at small cost as compared with the alternatives.

It is difficult to conceive of what the world situation would be today if the United States had not had the grain to support our industry and our Armed Forces during the war and subsequently to ship to Europe and Asia in record quantities--a movement still going on under the Marshall Plan, and the program under which the Occupied Areas are being administered. Obviously, our money means little without our grain, and grain is the backbone of our whole food supply whether it be in the form of carbohydrates, proteins, or fats. If Mother Nature had frowned upon us as much in the 40's as she did in the 30's, I fear we might be much farther from our national objectives than we are today.

The Future

Demand Will Be Large

So much for history; what about the future? Obviously, the world grain situation (weather aside) cannot change much in a year. Yearly improvement is hoped for and should come, but it is fairly clear that world trade in grains should stay high. Let us recall that world grain production in 1947-48 was only 85 percent of requirements based upon prewar consumption and present population levels--short something like 90 million tons for the world excluding the four major exporters. The so-called wonderful crop of 1948 in Europe is still less than prewar. There is a market for grain if there is the necessary purchasing power. If it doesn't move, it means that rations must be lower, and hungry people are dissatisfied people. For the time being we will continue to furnish purchasing power to an important block of importers; therefore, we'll have a market for our large crops.

Reciprocal Trade or Grants Necessary

Eventually, however, there may be a strong tendency away from grants as a basis for exports. Already some claimants are turning from us because of a lack of purchasing power, either in the form of dollars or ability to exchange their goods and services in this country for our grain. Obviously we must buy what the other man has to sell, collectively speaking, if we are to sell him our grains. Currently India, Cuba, Mexico, Brazil, Portugal and Switzerland are our only important cash buyers. Brazil is one of those that have indicated a necessity to restrict purchases, and Mexico also is running out of dollars. Most of these countries will buy elsewhere today whenever they can do so on a commodity exchange basis. Of the 1947-48 world wheat movement, 26.5 percent moved under bilateral trade agreements and, excluding our part of that world trade, 78 percent moved in this manner. Canada moved 78 percent in this manner, Australia 49 percent and Argentina 100 percent. These are signs not to be ignored. We already have most of the world's gold. Unless this country develops a means of exchange with the major importers, possibly on an entirely new basis in relation to prewar practices, there will develop a very strong tendency for most of them to obtain their grain elsewhere, either by increasing home production (which seems to promise little) or by finding suppliers that are anxious to buy their goods--manufactured goods mostly. This means increased trade with the present major grain producers and exporters that are still underdeveloped industrially.

Areas of Possible Expanded Production

The extent to which these countries can expand production is unknown, but some elasticity exists no doubt (Charts, pages 51 and 52.) Judging by historical performance under good and bad market conditions it appears quite questionable that large expansion of acreage might be expected from Canada or Australia. In Argentina where there is consider-

able additional acreage suited to grain production, corn and wheat acreage had been trending downward since several years prior to the war. Wider adoption of improved cultural practices and superior varieties may contribute more than new acreage in these countries. The possibilities of further development of acreage and yield in the USSR are unknown but should not be overlooked. She has vast areas of land suited to small grain production, the largest black land area in the world. Russia could expand production considerably without use of new land, since acreage is still much below prewar. It is possible that considerable expansion of grain production could take place in Asiatic Russia. With a population about one-third above that of the United States there must be a very strong pressure to increase food production, a pressure which no doubt will bear fruit within a matter of a few years in view of the current Russion program. And in spite of the pressure of population, there will be a very strong pressure for some of that grain to flow to present deficit areas, for they are the areas needing to sell their industrial goods--just what Russia wants to feed her growing industrial program. And these may be the same areas that are unable to get needed grain elsewhere. This subject seems worthy of our best national thought. Do we want our friends to find they can fill their extra grain requirements only by asking Russia for grain?

Can We Maintain Exports?

Can we maintain our exportability at levels of recent years to assure our friends of needed grain? Obviously so in 1948-49. Most of our technical advances are here for future use, and further advances will be made, but I would not want to assure that weather conditions will continue as favorable for grain production as has been experienced during the past eight years. (Table 22 and Charts, pages 53 and 54.) The grains, being grasses, should show growth in any particular period rather closely related to that of the pasture grasses. The chart on pasture condition reveals a low period in the early and mid-thirties and a marked improvement since 1936, with only good years since 1939. When one recognizes that there has been no significant adoption of the technical advances in pasture culture, but rather a constant deterioration in quality of land devoted to pasture, accompanied by heavy use during the war years, it is realized that the basic trend in pasture conditions is downward, making the effects of the favorable weather of the 40's still more apparent. It seems obvious that a period of years with weather like the early to mid-thirties would be associated with sharply reduced yields, but probably somewhat in excess of those obtained in that period. And there is evidence that other such low moisture periods have been experienced in the past. Even one or two poor crop years would exhaust stocks now in prospect if current exports are maintained.

If yields cannot be maintained, can added acreage be sown? The answer is: "No, except in an emergency." Much thought has been given to this subject

by Department of Agriculture workers and others. The concensus is that some of our exports of recent years is a "sale of our heritage." We have been exploiting our agricultural plant to maintain production. Under present practices used by farmers, we are growing too many acres of grains. I refer you to testimony of officials of the Department of Agriculture on "Long Range Agriculture Policy and Programs," before Congressional Committees on Agriculture on April 21 and October 6, 7, and 8, 1947.

This testimony indicates a need for adjustment toward a more conservative agriculture than was practiced prewar or now. Total seeded grain acreage would need to be cut by 7 million acres from prewar levels, and by 16 million acres from 1948 levels. A higher proportion of the grain acreage would be in feed grains. Food grains would be cut almost 7 million acres from prewar levels and 15.6 million acres from 1948 acreage. Wheat acreage would be cut to 62.5 million acres compared to 77.7 million seeded for this year--a cut of one-fifth. Even these acreages would mean that 60 percent of our land would be impaired by use under present practices, and a considerable improvement in techniques of production will be necessary to assure the indefinite use of this land. An increase in summer fallow is necessary, and one-fifth more land should be devoted to tame grasses and legumes for hay and pasture. These acreages would yield a grain production estimated to permit the exportation of 100 million bushels of wheat, 20 million bushels of rice, 25 million bushels of corn and some grain products, say 4 to 4½ million tons of grain, compared with 15 million exported of recent years. All the remainder of production is calculated to be needed for domestic use if desirable levels of consumption are maintained. This is the long time program with high domestic levels of living and conservation of our resources as prime objectives. It is the desirable program for all times that other objectives are not more important.

We Must Prepare for Possible High Exports in Future

But it is clear that such a program supplies us with a mighty small stack of chips with which to stay in the present world game being played alongside a world deficit of scores of millions of tons by prewar standards. Other objectives must be paramount for the time being. In connection with the development of the European Recovery Program the Krug Committee made a study of our resources and indicated what supplies might reasonably be counted on to be available for export over the next few years. That Committee thought in terms of a billion-bushel wheat crop and a 3-billion-bushel corn crop (more wheat and less corn than the long-term program) giving exports of up to 250 to 300 million bushels of wheat and up to 100 million of corn with some additional small grain products and rice. This gives an export availability of about 12 million tons--75 to 80 percent of performance in the past two years and about the same as 1945-46 exports. In some years exports might be higher, but the Committee indicated that we could not "safely" plan on more than this quantity--even assuming a

heavy drain on our soils. Obviously, there would be yearly variation unless reserves are built in good years and drawn upon in poor years.

A Program for the Future

Such a continuous program would not be without cost, and in no sense should it be considered a mere opportunity to market our surplus. A conservation program far beyond any conceived to date would be necessary to assure against permanent impairment of our soil resources. It also would necessitate an expansion of the ever-normal granary concept to provide for greatly increased stocks, particularly for coarse grains, so as to assure that exports can be maintained if needed in one or more short crop years without causing a major liquidation of our livestock (as happened last year) with all its dire effects upon the domestic food supply and the economy generally. Billion-bushel yearly variations in our corn crop are not uncommon, and even half this amount can be devastating. It necessitates a continuation of a price support program to farmers to assure desired production and to lessen the effects on price of the large reserves of grain which are necessary. Also of prime necessity is a continued interest on our part in world affairs, and the backing of that interest with a determination to foster world trade, either by exchanging our goods and services for those of our world neighbors or by continuing an aid program to those needy countries that will cooperate in fostering the principles in which we are most interested. Possibly we need a new concept of "goods and services" which are needed by this nation and are acceptable as payment for our exports.

Obviously, such a program is far reaching, the responsibilities of which vastly exceed those of American grain farmers, of the Department of Agriculture or of agriculture generally. It is the responsibility of every Government department, every group and every individual that recognizes the importance of food in preserving world peace, in attaining our world objectives or in shortening any conflict which might be imposed upon us. Too much stress cannot be placed upon the importance of adequate reserves. Too little we give thanks for the large grain reserves we had at the last war's beginning--1.4 billion bushels in 1942. And how quickly they disappeared even with record-breaking crops year after year! How much different our experience in that war might have been if it had been necessary to tailor our effort to the food supply which would have been available if that conflict had broken upon us five years earlier! Another time we might be unfortunate enough to have such a responsibility in a period of poor crop years. Matters of such great importance to a country of our standing in world affairs cannot be left to chance. Food cannot just be taken for granted.

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TABLE 1. Index Numbers of Gross Farm Production of Grains and Livestock

(1935-39 = 100)

	Food Grains a/	Feed Grains, Hay and Pasture b/	Livestock, Dairy & Poultry Products
1929	106	103	97
1930	115	94	99
1931	122	103	101
1932	98	113	101
1933	72	96	103
1934	69	72	97
1935	84	103	94
1936	83	77	99
1937	115	106	98
1938	120	108	101
1939	98	106	108
1940	107	111	110
1941	121	116	117
1942	126	129	130
1943	109	122	139
1944	136	124	138
1945	142	124	139
1946	146	128	135
1947	173	109	135
1948 c/	164	131	128

a/ Wheat, rye, rice and buckwheat.
b/ Corn, oats, barley, grain sorghums, tame hay, wild hay, sorghum for forage, and estimated pasture consumed by all livestock.
c/ Based on August 1 Crop Report.

Source: Division of Farm Management & Costs
Bureau of Agricultural Economics

USDA-PMA
Price Support and Foreign Supply
September 7, 1948

TABLE 2. Harvested Acreage and Production of Major Grains in the United States, 1937-1948

Year	Total Grains	Bread Grains	Wheat	Rye	Coarse Grains	Corn	Oats	Barley	Grain Sorghums	Rice (not included in totals)
Harvested acreage in million acres										
1937	213	68	64	4	145	94	36	10	5	1
1938	217	73	69	4	144	92	36	11	5	1
1939	196	57	53	4	139	88	33	13	5	1
1940	197	56	53	3	141	86	35	14	6	1
1941	203	60	56	4	143	85	38	14	6	1
1942	202	54	50	4	148	87	38	17	6	1
1943	207	54	51	3	153	92	39	15	7	1
1944	217	62	60	2	155	94	40	12	9	1
1945	213	67	65	2	146	88	42	10	6	1
1946	217	69	67	2	148	88	43	10	7	2
1947	216	76	74	2	140	84	39	11	6	2
1948 1/	219	74	72	2	145	85	41	12	7	2
12 Yr. Ave.	210	64	61	3	146	89	38	12	6	1
Grain production in million bushels										
1937	5,035	923	874	49	4,112	2,643	1,177	222	70	53
1938	4,938	976	920	56	3,962	2,549	1,089	257	67	53
1939	4,650	780	741	39	3,870	2,581	958	278	53	54
1940	4,955	855	815	40	4,100	2,457	1,246	311	86	54
1941	5,298	986	942	44	4,312	2,652	1,183	363	114	51
1942	5,973	1,022	969	53	4,951	3,069	1,343	429	110	65
1943	5,412	873	844	29	4,539	2,966	1,140	323	110	65
1944	5,781	1,083	1,060	23	4,698	3,088	1,149	276	185	69
1945	5,913	1,132	1,108	24	4,781	2,881	1,536	267	97	68
1946	6,289	1,172	1,153	19	5,117	3,250	1,498	262	107	72
1947	5,383	1,391	1,365	26	3,992	2,401	1,216	279	96	79
1948 1/	6,731	1,311	1,284	27	5,420	3,506	1,470	313	131	80
12 Yr. Ave.	5,530	1,042	1,006	36	4,488	2,837	1,250	298	102	64
Yield in bushels per acre										
Ave. '37-48	26	16	16	12	31	32	33	24	16	47
Indicated '48	31	18	18	12	37	41	36	26	18	46

1/ Based on August 1 indications.

Source: BAE Feed Statistics and Crop Report

USDA-PMA
Price Support and Foreign Supply
August 24, 1948

Table 2.

TABLE 3.WHEAT: Supply and Distribution in the United States, 1930-1948

(In million bushels)

Year Beginning July	Stocks at Beginning of Period	New Crop	Imports	Total Supply	Stocks at End of Period	Distribution					
						Total	Domestic Disappearance				Exports and Shipments
							Food	Feed	Seed	Industrial	
1930	291	887	-	1,178	312	866	490	180	81	-	115
1931	312	942	-	1,254	375	879	483	190	80	-	126
1932	375	756	-	1,131	378	753	492	143	83	-	35
1933	378	552	-	930	273	657	448	103	78	-	28
1934	273	526	16	815	146	669	459	114	83	-	13
1935	146	628	35	809	140	669	473	101	88	-	7
1936	140	630	35	805	1/ 103	702	478	115	97	-	12
1937	1/ 83	874	1	958	153	805	475	133	94	-	103
1938	153	920	-	1,073	250	823	481	157	75	-	110
1939	250	741	-	991	280	711	475	115	73	-	48
1940	280	815	3	1,098	385	713	479	123	74	-	37
1941	385	942	3	1,330	631	699	488	116	62	2	31
1942	631	969	1	1,601	619	982	537	292	65	54	34
1943	619	844	136	1,599	317	1,282	543	488	77	108	66
1944	317	1,060	42	1,419	279	1,140	543	281	81	82	153
1945	279	1,108	2	1,389	100	1,289	488	304	82	21	394
1946	100	1,153	-	1,253	84	1,169	494	191	86	0	398
1947	84	1,365	-	1,449	195	1,254	498	179	91	1	485
1948 2/	195	1,284	-	1,479							

1/ Prior to July 1, 1937, some new wheat was included. Beginning with 1937 only old crop wheat is shown.

2/ Based on August 1 indications.

Source: BAE Feed Statistics and Wheat Situation

USDA/PMA
Price Support and Foreign Supply
August 24, 1948

TABLE 4. RYE: Supply and Distribution in the United States, 1934-1948

(In million bushels)

Year Beginning July	Stocks at Beginning of Period	New Crop	Imports	Total Supply	Stocks at End of Period	Distribution					
						Total	Domestic Disappearance				Exports and Shipments
							Food	Feed	Seed	Industrial	
1934	15	16	11	42	11	31	8	5	8	10	-
1935	11	57	2	70	20	50	7	22	9	12	-
1936	20	24	4	48	5	43	7	14	10	12	-
1937	5	49	-	54	9	45	6	13	9	6	6
1938	9	56	-	65	22	43	7	20	10	5	1
1939	22	39	-	61	20	41	7	20	7	6	1
1940	20	40	1	61	19	42	7	20	8	7	-
1941	19	44	8	71	29	42	8	19	8	7	-
1942	29	53	2	84	1/ 39	45	8	27	7	2	1
1943	1/ 47	29	8	84	31	53	9	33	6	4	1
1944	31	23	4	58	12	46	8	19	6	10	3
1945	12	24	2	38	2	36	7	9	5	8	7
1946	2	19	2	23	2	21	6	5	5	4	1
1947	2	26	-	28	3	25	6	5	5	6	3
1948 2/	3	27	-	30							

1/ Stocks in interior mills and elevators not available until 1943.

2/ Based on August 1 indications.

Source: BAE Feed Statistics and Wheat Situation

USDA/PMA
Price Support and Foreign Supply
August 24, 1948

TABLE 5. RICE: Supply and Distribution in the United States, 1934-1948

(Rough rice equivalent in million bushels)

Year Beginning August	Stocks at Beginning of Period	New Crop	Imports	Total Supply	Stocks at End of Period	Distribution					
						Total	Domestic Disappearance				Exports and Shipments
							Food	Feed	Seed	Industrial	
1934	6	39	1	46	2	44	26	1	2	-	15
1935	2	39	1	42	3	39	23	1	2	-	13
1936	3	50	-	53	6	47	28	2	3	-	14
1937	6	54	-	60	5	55	27	1	3	1	23
1938	5	53	-	58	8	50	25	1	2	1	21
1939	8	54	-	62	9	53	27	1	2	2	21
1940	9	55	-	64	6	58	27	1	3	2	25
1941	6	51	-	57	1	56	25	1	3	2	25
1942	1	64	-	65	5	60	28	1	4	2	25
1943	5	65	-	70	5	65	25	1	4	5	30
1944	5	69	-	74	2	72	35	1	4	5	27
1945	2	68	-	70	2	68	25	1	4	5	33
1946	2	72	-	74	2	72	25	1	4	4	38
1947	2	79	-	81	1	80	27	2	4	8	39
1948 1/	1	80	-	81							

1/ Based on August 1 indications.

Source: BAE Wheat Situation.

USDA/PMA
Price Support and Foreign Supply
August 24, 1948

TABLE 6. CORN: Supply and Distribution in the United States, 1926-1948

(In million bushels)

Year Beginning October	Stocks at Beginning of Period	New Crop	Imports	Total Supply	Stocks at End of Period	Distribution					
						Total	Domestic Disappearance				Exports and Shipments
							Food 1/	Feed	Seed	Industrial 1/	
1926	280	2,547	4	2,831	217	2,614	145	2,398	18	37	16
1927	217	2,616	3	2,836	94	2,742	153	2,515	18	37	19
1928	94	2,666	-	2,760	147	2,613	156	2,358	18	40	41
1929	147	2,516	1	2,664	139	2,525	145	2,315	19	38	8
1930	139	2,080	1	2,220	168	2,052	131	1,874	20	25	2
1931	168	2,576	-	2,744	270	2,474	128	2,296	20	26	4
1932	270	2,930	-	3,200	386	2,814	131	2,624	20	31	8
1933	386	2,398	1	2,785	338	2,447	127	2,261	18	37	4
1934	338	1,449	37	1,824	65	1,759	114	1,584	18	42	1
1935	65	2,299	21	2,385	176	2,209	127	2,002	18	61	1
1936	176	1,506	104	1,786	66	1,720	118	1,529	17	56	..
1937	66	2,643	2	2,711	362	2,349	122	2,028	16	43	140
1938	362	2,549	-	2,911	584	2,327	125	2,108	15	45	34
1939	584	2,581	1	3,166	688	2,478	129	2,243	14	48	44
1940	688	2,457	1	3,146	645	2,501	141	2,271	13	61	15
1941	645	2,652	-	3,297	491	2,806	166	2,509	12	99	20
1942	491	3,069	-	3,560	2/ 364	3,196	176	2,916	13	86	5
1943	2/ 384	2,966	4	3,354	231	3,123	173	2,874	13	53	10
1944	231	3,088	6	3,325	315	3,010	176	2,724	12	81	17
1945	315	2,881	1	3,197	173	3,024	158	2,767	13	66	20
1946	173	3,250	-	3,423	285	3,138	185	2,709	12	105	127
1947	285	2,401	1	2,687	125	2,562	151	2,325	12	69	5
1948 3/	125	3,506	-	3,631							

1/ Estimates derived from data published in BAE Feed Statistics.
2/ Stocks in interior mills, elevators and warehouses are not available prior to 1943.
3/ Based on August 1 indications.

Source: BAE Feed Statistics

USDA/PMA
Price Support and Foreign Supply Branch
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TABLE 7. OATS: Supply and Distribution in the United States, 1926-1948

(In million bushels)

Year Beginning July	Stocks at Beginning of Period	New Crop	Imports	Total Supply	Stocks at End of Period	Distribution					
						Total	Domestic Disappearance: Food	Feed	Seed	Industrial	Exports and Shipments
1926	259	1,153	-	1,412	171	1,241	45	1,092	95	-	9
1927	171	1,094	-	1,265	118	1,147	45	1,001	95	-	6
1928	118	1,313	-	1,431	188	1,243	42	1,095	95	-	11
1929	188	1,113	-	1,301	157	1,144	42	997	100	-	5
1930	157	1,274	1	1,432	177	1,255	45	1,105	104	-	1
1931	177	1,124	-	1,301	153	1,148	44	995	107	-	2
1932	153	1,254	-	1,407	234	1,173	38	1,028	103	-	4
1933	234	737	-	971	130	841	34	711	95	-	1
1934	130	544	16	690	79	611	31	478	102	-	-
1935	79	1,210	-	1,289	281	1,008	29	880	98	-	1
1936	281	792	-	1,073	91	982	28	860	94	-	-
1937	91	1,177	-	1,268	209	1,059	28	927	93	-	11
1938	209	1,089	1	1,299	196	1,103	29	980	90	-	4
1939	196	958	10	1,164	148	1,016	30	894	92	-	-
1940	148	1,246	10	1,404	223	1,181	31	1,052	98	-	-
1941	223	1,183	1	1,407	194	1,213	34	1,076	102	-	1
1942	194	1,343	59	1,596	1/ 240	1,356	44	1,208	104	-	-
1943	1/ 259	1,140	81	1,480	208	1,272	44	1,124	104	-	-
1944	208	1,149	69	1,426	234	1,192	46	1,037	109	-	-
1945	234	1,536	24	1,794	292	1,502	50	1,323	111	-	18
1946	292	1,498	1	1,791	276	1,515	50	1,344	101	-	20
1947	276	1,216	1	1,493	185	1,308	50	1,139	108	-	11
1948 2/	185	1,470	-	1,655							

1/ Stocks in interior mills, elevators and warehouses not available prior to 1943.
2/ Based on August 1 indications.

Source: BAE Feed Statistics.

USDA/PMA
Price Support and Foreign Supply Branch
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TABLE 8. BARLEY: Supply and Distribution in the United States, 1934-1948

(In million bushels)

Year Beginning July	Stocks at Beginning of Period	New Crop	Imports	Total Supply	Stocks at End of Period	Distribution					
						Total	Domestic Disappearance				Exports and Shipments
							Food 1/	Feed	Seed	Industrial 1/	
1934	32	117	18	167	18	149	51	63	24	7	4
1935	18	289	8	315	64	251	56	152	23	10	10
1936	64	148	29	241	22	219	62	120	22	10	5
1937	22	222	6	250	33	217	59	113	21	6	18
1938	33	257	3	293	51	242	55	146	25	5	11
1939	51	278	3	332	50	282	56	191	25	5	5
1940	50	311	2	363	60	303	56	213	26	6	2
1941	60	363	2	425	70	355	65	246	32	9	3
1942	70	429	27	526	2/ 90	436	70	321	28	15	2
1943	2/ 121	323	41	485	76	409	71	292	24	19	3
1944	76	276	38	390	95	295	74	171	19	26	5
1945	95	267	6	368	59	309	73	193	19	15	9
1946	59	262	4	325	56	269	81	139	20	13	16
1947	56	279	1	336	51	285	90	138	22	11	24
1948 3/	51	313	-	364							

1/ Estimates derived from data published in BAE Feed Statistics.
2/ Stocks in interior mills, elevators and warehouses not available prior to 1943.
3/ Based on August 1 indications.

Source: BAE Feed Statistics.

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Table 9.

TABLE 9. Corn Acreage Planted with Hybrid Seed, and Corn Yields, United States, 1933-1948

Year	All Corn Planted	Indicated Hybrid Corn Planted	Percentage Planted with Hybrid Seed	Yield per Planted Acre
	(Million Acres)		(Percent)	(Bushels)
1933	109.8	.1	.1	21.8
1934	100.6	.4	.4	14.4
1935	100.0	1.1	1.1	23.0
1936	102.0	3.2	3.1	14.8
1937	97.2	7.6	7.9	27.2
1938	94.5	14.1	14.9	27.0
1939	91.6	20.6	22.5	28.2
1940	88.7	27.0	30.5	27.7
1941	86.8	34.1	39.3	30.6
1942	88.8	41.2	46.4	34.6
1943	94.3	49.4	52.4	31.5
1944	95.5	56.5	59.2	32.3
1945	89.7	57.8	64.4	32.1
1946	89.8	61.6	68.6	36.2
1947	86.2	62.1	72.1	27.9
1948	86.7	65.1	75.1	40.4

Source: BAE Crop Reporting Board

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TABLE 10. Origin of World Exports of Grain and Grain Products (Excl. Rice)
Average 1933-34 to 1937-38, Annual 1945-46, 1946-47 and 1947-48

Period and Origin	Bread Grains		Coarse Grains		All Grains	
	Total	Percent	Total	Percent	Total	Percent
	Million L.T.		Million L.T.		Million L.T.	
1933-34 to 1937-38						
United States	1.0	6	1.1	8	2.1	7
Canada	4.9	32	.5	4	5.4	19
Australia	2.8	18	.1	1	2.9	10
Argentina	3.6	23	7.1	56	10.7	38
All Others	3.3	21	3.8	31	7.1	26
Total	15.6	100	12.6	100	28.2	100
1945-46						
United States	10.9	45	.9	22	11.8	41
Canada	9.8	40	.9	22	10.7	37
Australia	1.0	4	-	-	1.0	4
Argentina	2.0	8	1.9	44	3.9	14
All Others	.6	3	.5	12	1.1	4
Total	24.3	100	4.2	100	28.5	100
1946-47						
United States	10.8	52	4.1	53	14.9	52
Canada	6.2	30	.5	7	6.7	24
Australia	1.3	7	.1	1	1.4	5
Argentina	1.7	8	2.6	32	4.3	15
All Others	.7	3	.5	7	1.2	4
Total	20.7	100	7.8	100	28.5	100
1947-48						
United States	12.9	49	2.1	25	15.0	44
Canada	5.7	22	.1	2	5.8	17
Australia	2.8	11	.4	4	3.2	9
Argentina	3.1	12	3.9	47	7.0	20
All Others	1.7	6	1.9	22	3.6	10
Total	26.2	100	8.4	100	34.6	100

Source: Office of Foreign Agricultural Relations
USDA

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TABLE 11. RICE: World Area and Production of Paddy (rough rice) Prewar, 1946-47 and 1947-48

Country or Area	Area			Production		
	Average 1934/35-1938/39	1946-47	1947-48 (Provisional)	Average 1934/35-1938/39	1946-47	1947-48 (Provisiona
	(Million hectares) a/			(Million metric tons) b/		
Asia	78.0	76.3	78.1	138.4	130.7	134.7
Europe	.2	.2	.2	1.1	.8	1.0
Africa and Oceania	1.6	2.3	2.4	2.0	2.8	3.1
North and Central America	.5	.9	.9	1.2	1.8	2.0
South America	1.2	2.1	2.0	1.8	3.6	3.1
Estimated World Total (Excl. USSR)	81.5	81.8	83.6	144.5	139.7	143.9

a/ One hectare equals 2.47 acres.
b/ One metric ton equals 49 bushels of rough rice.

TABLE 12. RICE: Exports from Principal Producing Countries (In terms of milled rice)

Country or Area	Average 1934-38		1947		Recommended Allocation for 1948	
	Quantity (Mil. m. t.)	% of Total (Percent)	Quantity (Mil. m. t.)	% of Total (Percent)	Quantity (Mil. m. t.)	% of Total (Percent)
Asia	7.8	94.4	a/ 1.3	56.7	a/ 2.3	71.9
Europe	.2	2.2	-	-	-	-
Africa	.1	1.3	.2	9.1	.2	6.2
Oceania	-	.2	-	.8	-	-
Western Hemisphere	.2	1.9	.7	33.4	.7	21.9
Approximate World Total	8.3	100.0	2.2	100.0	3.2	100.0

a/ Since the war, there are only three net exporting countries in Asia, Burma, Siam and Indo-China.

Source: Food and Agriculture Organization of the United Nations, Commodity Series Rice Bulletin No. 1, May 1948

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TABLE 13. World Population by Continents, Areas and Selected Countries Prewar and Estimated 1950
(In Millions)

Areas, 1946 Boundaries	December 31, 1936	Estimated December 31, 1950	Percentage Change
WORLD	2,076	2,329	+ 12
Africa	151	181	+ 20
Egypt	16	19	+ 19
French Africa	41	51	+ 24
Union of South Africa	10	12	+ 20
Americas	264	321	+ 22
North America	140	161	+ 15
Canada	11	13	+ 18
U. S. A.	129	148	+ 15
Mid-America	39	52	+ 33
South America	85	108	+ 27
Argentina	13	15	+ 15
Brazil	39	51	+ 31
Asia (Excl. Russia)	1,093	1,224	+ 12
Burma	16	18	+ 13
Ceylon	6	7	+ 17
China	425	430	+ 1
French Asia	23	27	+ 17
India	367	432	+ 18
Japan	69	a/ 79	+ 14
Korea	23	29	+ 26
Saudi Arabia	4	5	+ 25
Turkey	17	20	+ 18
Soviet Union	187	198	+ 6
Europe	371	393	+ 6
Czechoslovakia	14	12	- 14
France	42	40	- 5
Germany (4 Zones)	58	b/ 72	+ 24
Great Britain and Northern Ireland	47	50	+ 6
Greece	7	8	+ 14
Italy	42	47	+ 12
Netherlands	9	10	+ 11
Poland	32	a/ 23	- 28
Portugal	7	9	+ 29
Spain	25	29	+ 16
Sweden	6	7	+ 17
Oceania	10	12	+ 20

a/ Recent census indicates 1950 population will exceed this estimate.
b/ Recent census indicates 1950 population will be less than this estimate.

Source: Estimate as of March 1, 1947, Report 4192 by O. I. R., U. S. Department of State

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TABLE 14. World Grain Acreage and Production

Prewar and Postwar

Commodity	Acreage				1947 as % Change from 1935-39	Production				1947 as % Change from 1935-39
	Average 1935-39	1945	1946	1947		Average 1935-39	1945	1946	1947	
	(Million acres)					(Million long tons)				
Breadgrains	518	471	492	503	- 3	204	171	191	192	- 6
Rice (rough)	206	203	206	207	- -	149	129	140	142	- 5
Coarse grains	479	448	447	456	- 5	231	221	234	220	- 5
Total	1,203	1,122	1,145	1,166	- 3	584	521	565	554	- 5
Total Four Exporters a/	291	284	297	297	+ 2	135	163	178	160	+ 19
Balance for World	912	838	848	869	- 5	449	358	387	394	- 12

a/ Australia, Argentina, Canada, and United States.

Source: Office of Foreign Agricultural Relations

USDA/PMA
Price Support and Foreign Supply
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TABLE 15. Grain Situation in E.R.P. Countries a/
Prewar and Post war

Period	Area	Yield	Production	Imports	Total Supply	Per cent of Prewar Yield	Per cent of Prewar Production
	(Million hectares)	(Quintals per hectare)	(Million metric tons)				
Prewar							
Bread grains	18.4	16	30.0	12.6	42.6		
Coarse grains	15.2	18	27.1	11.3	38.4		
Total grains	33.6	17	57.1	23.9	81.0		
1946-47							
Bread grains	16.8	15	25.7	12.7	38.4	94	85
Coarse grains	15.1	17	25.6	4.7	30.3	96	95
Total grains	31.9	16	51.3	17.4	68.7	95	90
1947-48							
Bread grains	15.7	13	19.8	16.6	36.4	77	66
Coarse grains	15.9	15	24.3	4.7	29.0	86	90
Total grains	31.6	14	44.1	21.3	65.4	82	77
1948-49 (Estimated)							
Bread grains	17.3	16	27.9	15.4	43.3	99	93
Coarse grains	15.3	17	26.4	7.6	34.0	97	98
Total grains	32.6	17	54.3	23.0	77.3	98	95

a/ Includes Austria, Belgium, Denmark, France, Greece, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Sweden, Switzerland, United Kingdom, Western Germany and Iceland. Excludes Turkey.

Source: Historical data from Office of Foreign Agricultural Relations
1948-49 estimated by Inter-Agency Grain Committee

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TABLE 16. Argentine Grain Situation

Item	Average 1935-39	1946-47	1947-48	1947-48 as per cent change from 1935-39	1947-48 as per cent change from 1946-47
A. Harvested Acreage (thous. acres) a/					
Wheat	15,834	13,884	12,300	-22	-11
Rye	1,078	2,282	1,600	+48	-30
Total bread grains	16,912	16,166	13,900	-18	-14
Corn	10,775	6,431	7,800	-28	+21
Oats	1,974	1,990	2,200	+11	+11
Barley	1,286	2,427	2,300	+79	- 5
Total coarse grains	14,035	10,848	12,300	-12	+13
Total All Grains	30,947	27,014	26,200	-15	- 3
B. Production (thous. l. t.) a/					
Wheat	5,940	5,526	6,161	+ 4	+11
Rye	244	543	350	+43	-36
Total bread grains	6,184	6,069	6,511	+ 5	+ 7
Corn	7,550	5,723	7,125	- 6	+24
Oats	717	674	571	-20	-15
Barley	484	1,153	793	+64	-31
Total coarse grains	8,751	7,550	8,489	- 3	+12
Total All Grains	14,935	13,619	15,000	-	+10
C. Exports (thous. l. t.) a/					
Total bread grains	3,900	1,734	3,126	-20	+80
Total coarse grains	7,737	2,603	4,006	-48	+54
Total All Grains	11,637	4,337	7,132	-38	+64

a/ Acreage and production are for December-November crop years, exports are for fiscal years, July-June.

Source:
Office of Foreign Agricultural Relations
U. S. Department of Agriculture

USDA-PMA
Price Support and Foreign Supply Branch
August 31, 1948

TABLE 17. Australian Grain Situation

Item	Average 1935-39	1946-47	1947-48	1947-48 as per cent change from 1935-39	1947-48 as per cent change from 1946-47
A. Harvested Acreage (thous. acres) a/					
Wheat	13,128	13,172	14,000	↑ 7	↑ 6
Rye	15	20	20	↑33	-
Total bread grains	13,143	13,192	14,020	↑ 7	↑ 6
Corn	314	260	230	-27	-12
Oats	1,593	1,740	1,900	↑19	↑ 9
Barley	648	875	950	↑47	↑ 9
Total coarse grains	2,555	2,875	3,080	↑21	↑ 7
Total All Grains	15,698	16,067	17,100	↑ 9	↑ 6
B. Production (thous. l. t.) a/					
Wheat	4,547	3,141	6,107	↑34	↑94
Rye	4	6	7	↑75	↑17
Total bread grains	4,551	3,147	6,114	↑34	↑94
Corn	176	145	150	-15	↑ 3
Oats	334	276	500	↑50	↑81
Barley	250	259	450	↑80	↑74
Total coarse grains	760	680	1,100	↑45	↑62
Total All Grains	5,311	3,827	7,214	↑36	↑88
C. Exports (thous. l. t.) a/					
Total bread grains	2,696	1,315	2,777	↑ 3	↑111
Total coarse grains	62	51	373	↑502	↑631
Total All Grains	2,758	1,366	3,150	↑14	↑131

a/ Acreage and production are for December-November crop years, exports are for fiscal years, July-June.

Source:
Office of Foreign Agricultural Relations
U. S. Department of Agriculture

USDA - PMA
Price Support and Foreign Supply Branch
August 31, 1948

TABLE 18. Canadian Grain Situation

Item	Average 1935-39	1946	1947	Indicated 1948	1947 as per cent change from 1935-39	1947 as per cent change from 1946
A. Harvested Acreage (thous. acres)						
Wheat	25,593	24,076	24,260	24,106	- 5	+ 1
Rye	816	715	1,156	2,103	+42	+62
Total bread grains	26,409	24,791	25,416	26,209	- 4	+ 3
Corn	172	252	176	n.a.	+ 2	-30
Oats	13,246	12,075	11,048	11,200	-17	- 9
Barley	4,291	6,258	7,465	6,495	+74	+19
Total coarse grains	17,709	18,585	18,689		+ 6	+ 1
Total All Grains	44,118	43,376	44,105		0	+ 2
B. Production (thous. l.t.)						
Wheat	8,368	11,082	9,127	9,964	+ 9	-18
Rye	230	220	330	650	+43	+50
Total bread grains	8,598	11,302	9,457	10,614	+10	-16
Corn	175	267	167	n.a.	- 5	-37
Oats	4,830	5,301	3,981	4,829	-18	-25
Barley	1,905	3,190	3,029	3,129	+59	- 5
Total coarse grains	6,910	8,758	7,177		+ 4	-18
Total All Grains	15,508	20,060	16,634		+ 7	-17

	Average 1934-38	1946-47	1947-48	1947-48 as per cent change from 1934-38	1947-48 as per cent change from 1946-47
C. Exports (thous. l.t.)					
Total bread grains	4,784	6,214	5,770	+21	- 7
Total coarse grains	388	543	70	-	-
Total All Grains	5,172	6,757	5,840	+13	-14

Source:
Office of Foreign Agricultural Relations, U.S.D.A.

USDA-PMA
Price Support and Foreign Supply Branch
August 31, 1948

TABLE 19. Russian Grain Situation

Item	Average 1935-39	1946	1947	1947 as per cent change from 1935-39	1947 as per cent change from 1946
A. Harvested Acreage (thous. acres)					
Wheat	104,000	73,000	75,000	-28	↗ 3
Rye	60,800	70,000	71,000	↗17	↗ 1
Total bread grains	164,800	143,000	146,000	-11	↗ 2
Corn	10,000	6,500	7,200	-28	↗11
Oats	49,500	33,500	36,000	-27	↗ 7
Barley	26,600	17,000	20,500	-23	↗21
Total coarse grains	86,100	57,000	63,700	-26	↗12
Total All Grains	250,900	200,000	209,700	-16	↗ 5
B. Production (thous. l.t.)					
Wheat	33,214	20,893	23,437	-29	↗12
Rye	22,125	21,500	23,000	↗ 4	↗ 7
Total bread grains	55,339	42,393	46,437	-16	↗10
Corn	4,250	2,000	3,125	-26	↗56
Oats	16,643	8,572	11,715	-30	↗37
Barley	9,107	4,500	6,643	-27	↗48
Total coarse grains	30,000	15,072	21,483	-28	↗43
Total All Grains	85,339	57,465	67,920	-20	↗18

C. Estimated Utilization of 1947 Crop (thous l.t.)

Total production (including minor grains and legumes)	76,850
Total non-food use	28,770
Indigenous consumption	40,420
Available for stocks and export	7,660

Source: Office of Foreign Agricultural Relations
U. S. Department of Agriculture

USDA-PMA
Price Support and Foreign Supply Branch
August 31, 1948

TABLE 20. United States Grain Situation

Item	Average 1935-39	1946	1947	Indicated 1948	1948 as per cent change from 1935-39	1948 as per cent change from 1947
A. Harvested Acreage (thous. acres)						
Wheat	57,293	67,075	74,186	71,502	+25	- 4
Rye	3,699	1,607	2,022	2,187	-41	+ 8
Total bread grains	60,992	68,682	76,208	73,689	+21	- 3
Corn	92,699	88,489	83,981	85,497	- 8	+ 2
Oats	35,761	43,205	38,648	40,970	+15	+ 6
Barley	10,817	10,411	10,947	12,177	+13	+11
Total coarse grains	139,277	142,105	133,576	138,644	- 1	+ 4
Total All Grains	200,269	210,787	209,784	212,333	+ 6	+ 1
B. Production (thous. l.t.)						
Wheat	20,320	30,885	36,560	34,401	+69	- 6
Rye	1,122	472	649	667	-41	+ 3
Total bread grains	21,442	31,357	37,209	35,068	+64	- 6
Corn	57,889	81,249	60,024	87,659	+51	+46
Oats	14,934	21,399	17,371	21,007	+41	+21
Barley	5,113	5,620	5,983	6,710	+31	+12
Total coarse grains	77,936	108,268	83,378	115,376	+48	+38
Total All Grains	99,378	139,625	120,587	150,444	+51	+25

	Average 1934-38	1946-47	1947-48	1947-48 as per cent change from 1934-38	1947-48 as per cent change from 1946-47
C. Exports (thous. l.t.)					
Total bread grains	1,039	10,767	12,943	+1146	+20
Total coarse grains	278	4,136	2,123	+ 754	-49
Total All Grains	1,317	14,903	15,066	+1044	+ 1

Source;
Office of Foreign Agricultural Relations
U. S. Department of Agriculture

USDA - PMA
Price Support and Foreign Supply Branch
August 31, 1948

TABLE 21. Principal Bread and Coarse Grain Crops in Major Exporting Countries
Average 1935-39 - Annual 1946-48 a/

Commodity and Country	Harvested Acreage				Yield per Acre				Production			
	Average 1935-39	1946	1947	Indicated 1948	Average 1935-39	1946	1947	Indicated 1948	Average 1935-39	1946	1947	Indicated 1948
	(Million Acres)				(Bushels)				(Million Bushels)			
Wheat												
U. S.	57.3	67.1	74.2	71.5	13.2	17.2	18.4	18.0	758.6	1,153.0	1,364.9	1,284.3
Canada	25.6	24.1	24.3	24.1	12.2	17.2	14.0	15.4	312.4	413.7	340.8	372.0
Argentina	15.8	13.9	12.3		14.0	14.9	18.7		221.8	206.3	230.0	
Australia	13.1	13.2	14.0		12.9	8.9	16.3		169.7	117.3	228.0	
USSR	104.0	73.0	75.0		11.9	10.7	11.7		1,240.0	780.0	875.0	
Total	215.8	191.3	199.8		12.5	14.0	15.2		2,702.5	2,670.3	3,038.7	
Rye												
U. S.	3.7	1.6	2.0	2.2	12.1	11.7	12.8	12.2	44.9	18.9	26.0	26.7
Canada	.8	.7	1.2	2.1	11.3	12.3	11.4	12.4	9.2	8.8	13.2	26.0
Argentina	1.1	2.3	1.6		9.1	9.5	8.8		9.8	21.7	14.0	
USSR	60.8	70.0	71.0		14.6	12.3	13.0		885.0	860.0	930.0	
Total	66.4	74.6	75.8		14.3	12.2	12.8		948.9	909.4	973.2	
Corn												
U. S.	92.7	88.5	84.0	85.5	25.0	36.7	28.6	41.0	2,315.6	3,250.0	2,401.0	3,506.4
Argentina	10.8	6.4	7.8		28.0	35.6	36.5		302.0	228.9	285.0	
USSR	10.0	6.5	7.2		17.0	12.3	17.4		170.0	80.0	125.0	
Total	113.5	101.4	99.0		24.6	35.1	28.4		2,787.6	3,558.9	2,811.0	
Oats												
U. S.	35.8	43.2	38.6	41.0	29.2	34.7	31.5	35.9	1,045.3	1,497.9	1,216.0	1,470.4
Canada	13.2	12.1	11.0	11.2	25.5	30.7	25.2	30.2	338.1	371.1	278.7	388.0
Argentina	2.0	2.0	2.2		25.4	23.7	18.2		50.2	47.2	40.0	
USSR	49.5	33.5	36.0		23.5	17.9	22.8		1,165.0	600.0	820.0	
Total	100.5	90.8	87.8		25.9	27.7	26.8		2,598.6	2,516.2	2,354.7	
Barley												
U. S.	10.8	10.4	10.9	12.2	22.1	25.2	25.5	25.7	238.6	262.3	279.2	313.1
Canada	4.3	6.3	7.5	6.5	20.7	23.8	18.9	22.5	88.9	148.9	141.4	146.0
Argentina	1.3	2.4	2.3		17.6	22.2	16.1		22.6	53.8	37.0	
USSR	26.6	17.0	20.5		16.0	12.4	15.1		425.0	210.0	310.0	
Total	43.0	36.1	41.2		18.0	18.7	18.6		775.1	675.0	767.6	

a/ Years of harvest in the Northern Hemisphere and those in the Southern Hemisphere which immediately follow.

Source: USDA, Office of Foreign Agricultural Relations

USDA-PMA
Price Support and Foreign Supply
August 31, 1948

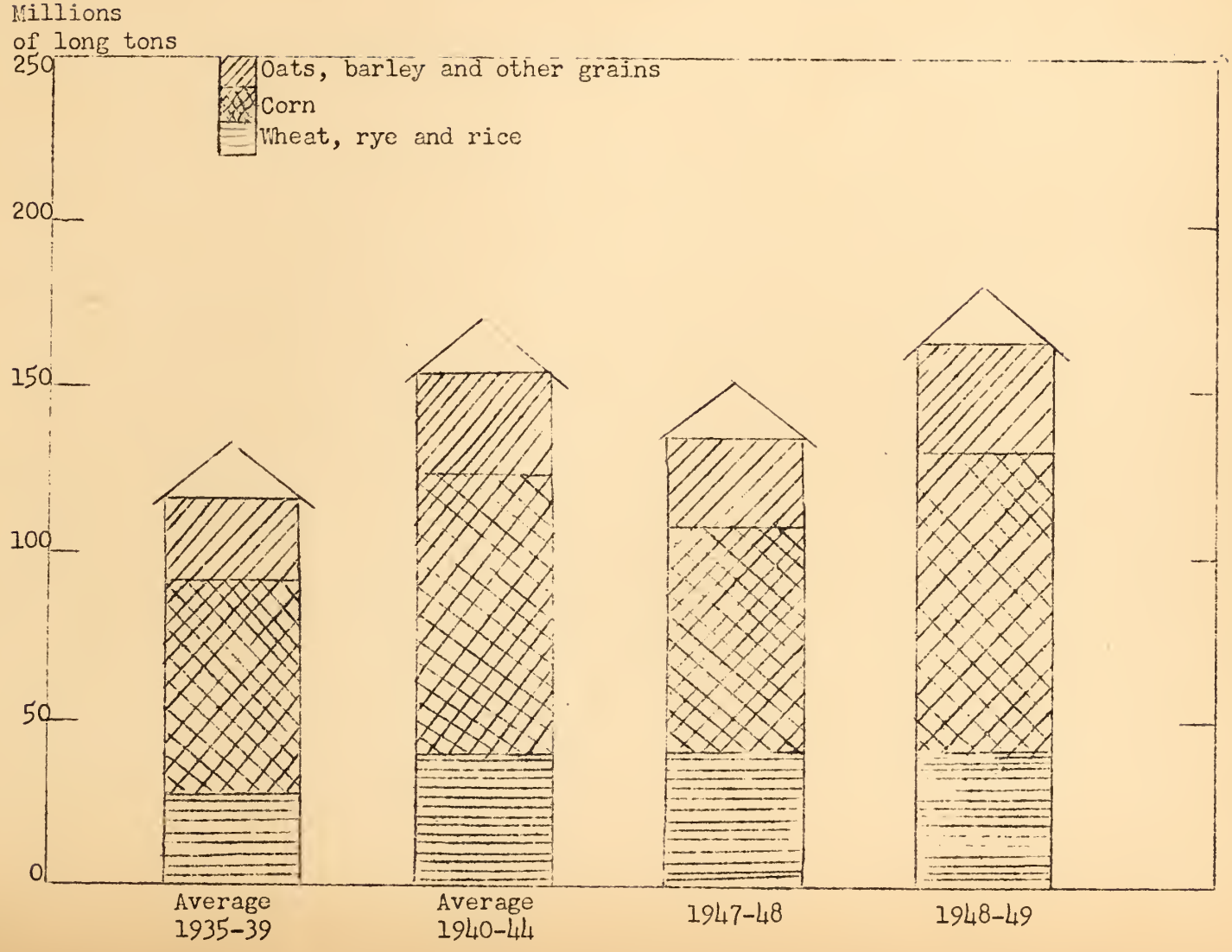
TABLE 22. Average Annual Precipitation, Selected States, 1901 - 1947
(Mean annual in inches)

Year	Kansas	North Dakota	Iowa	Year	Kansas	North Dakota	Iowa
1901	21.35	19.42	24.41	1924	24.23	17.11	31.39
2	34.42	19.35	43.82	25	25.08	16.64	28.24
3	31.35	19.25	35.39	26	24.80	15.37	33.07
4	31.01	17.85	28.51	27	32.40	21.52	29.35
5	30.77	18.89	36.56	28	33.40	17.88	35.96
6	28.58	20.02	31.60	29	27.96	14.31	30.20
7	26.46	14.30	31.61	30	26.87	14.90	26.10
8	32.30	18.56	35.09				
9	31.20	18.10	40.01	1931	25.90	14.99	35.37
10	19.67	12.53	19.89	32	23.76	17.18	32.27
				33	22.18	13.43	24.91
1911	24.53	18.42	31.37	34	20.02	9.47	26.85
12	26.69	20.35	28.65	35	28.47	18.03	33.16
13	23.02	14.65	29.95	36	18.31	8.83	26.00
14	23.58	18.98	31.93	37	20.88	17.03	27.60
15	40.77	19.29	39.53	38	27.27	15.33	36.29
16	23.84	19.88	28.90	39	20.08	14.15	25.16
17	19.60	10.75	27.81	40	25.67	17.39	30.66
18	27.60	16.00	32.78				
19	25.65	15.57	36.76	1941	36.92	23.22	36.83
20	26.65	15.29	31.75	42	33.15	18.75	32.63
				43	24.62	18.38	31.53
1921	24.19	19.45	32.03	44	37.47	21.46	37.26
22	29.01	19.88	29.98	45	30.20	14.85	34.60
23	31.88	17.78	29.50	46	28.29	16.60	35.16
				47	27.43	18.18	35.23

Source: Climatological Data 1947 Annual Summary
and
1941 Yearbook of Agriculture

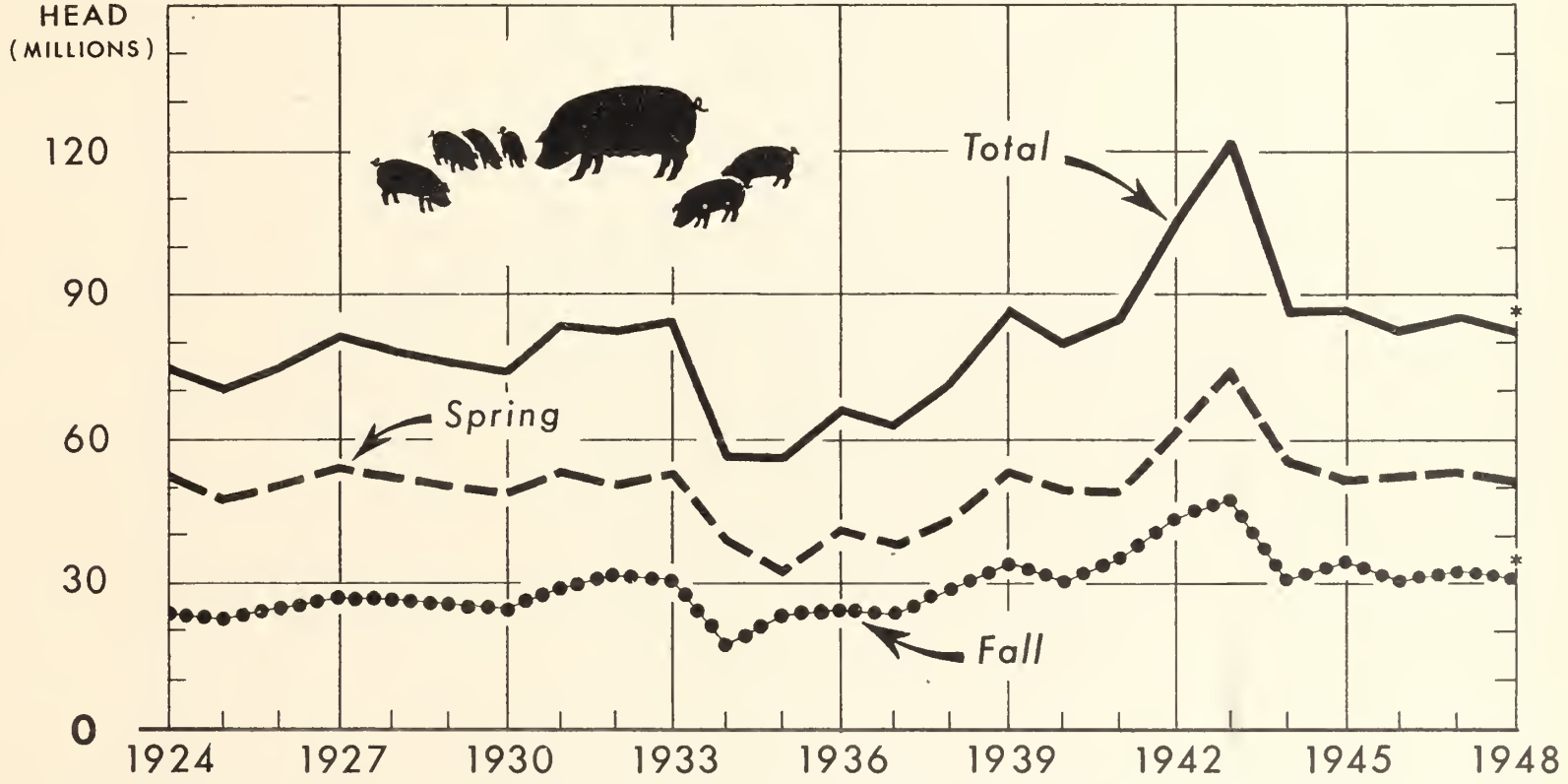
UNITED STATES GRAIN SUPPLIES

Stocks, Production, and Imports



USDA/PMA
rice Support & Foreign
Supply Branch
August 24, 1948

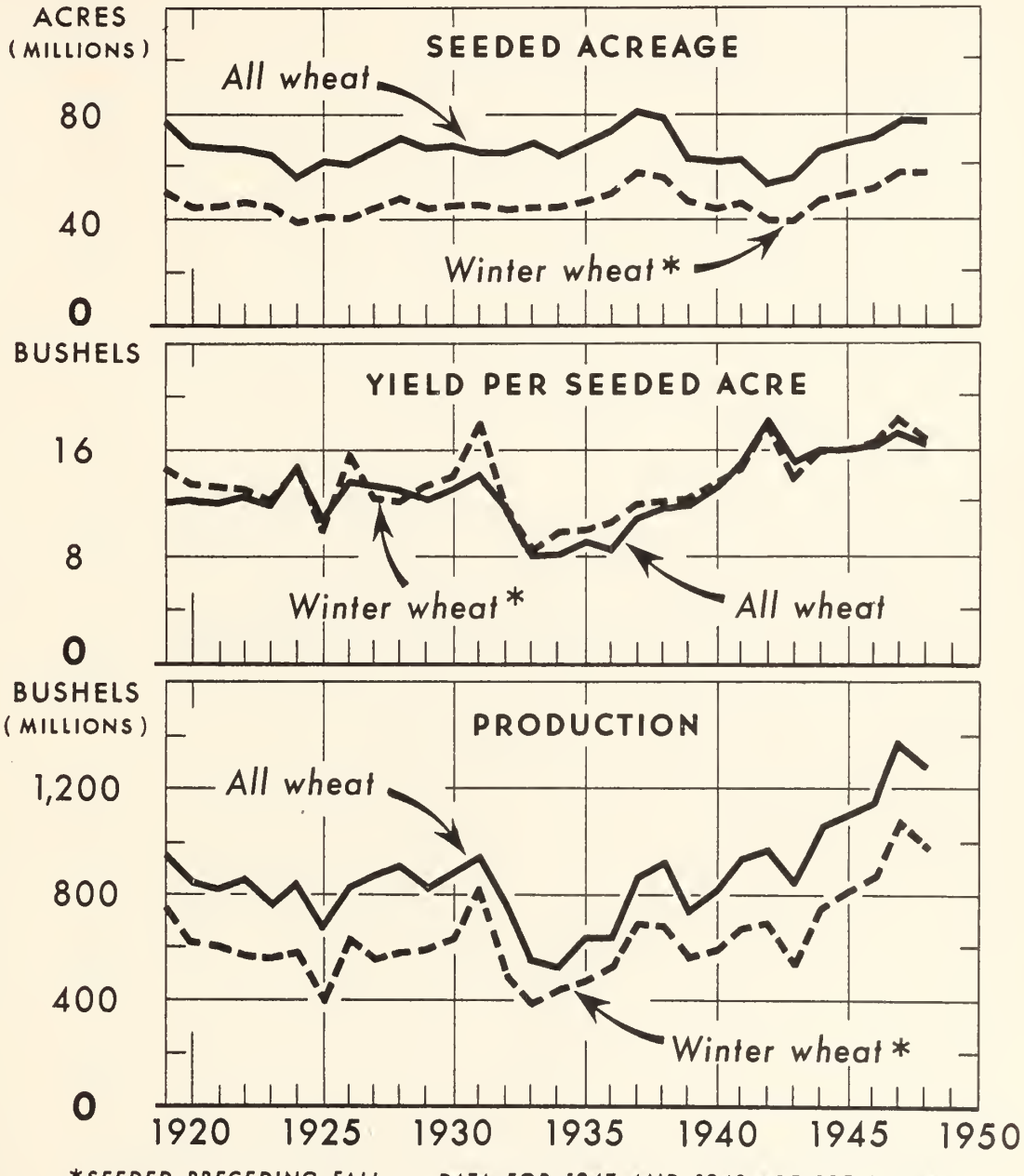
SPRING, FALL, AND TOTAL PIG CROPS, UNITED STATES, 1924-48



*FALL PIG CROP BASED ON SOWS INDICATED TO FARROW AND 1936-45 AV. NUMBER OF PIGS SAVED PER LITTER

U. S. DEPARTMENT OF AGRICULTURE NEG. 39337-X BUREAU OF AGRICULTURAL ECONOMICS

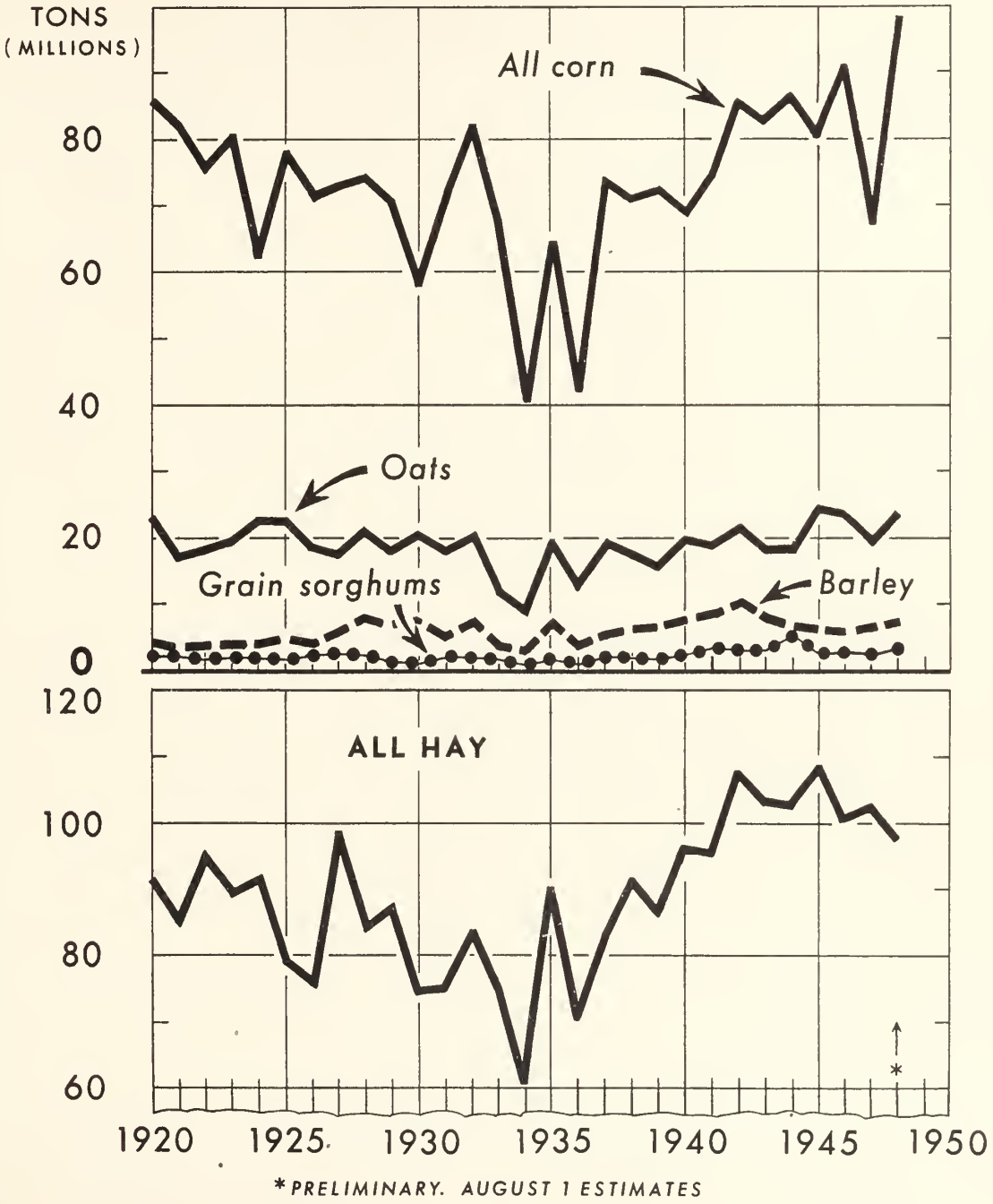
ALL WHEAT AND WINTER WHEAT: ACREAGE, YIELD, AND PRODUCTION, UNITED STATES, 1919-48



*SEEDED PRECEDING FALL DATA FOR 1947 AND 1948 ARE PRELIMINARY

U. S. DEPARTMENT OF AGRICULTURE NEG. 42549-X BUREAU OF AGRICULTURAL ECONOMICS

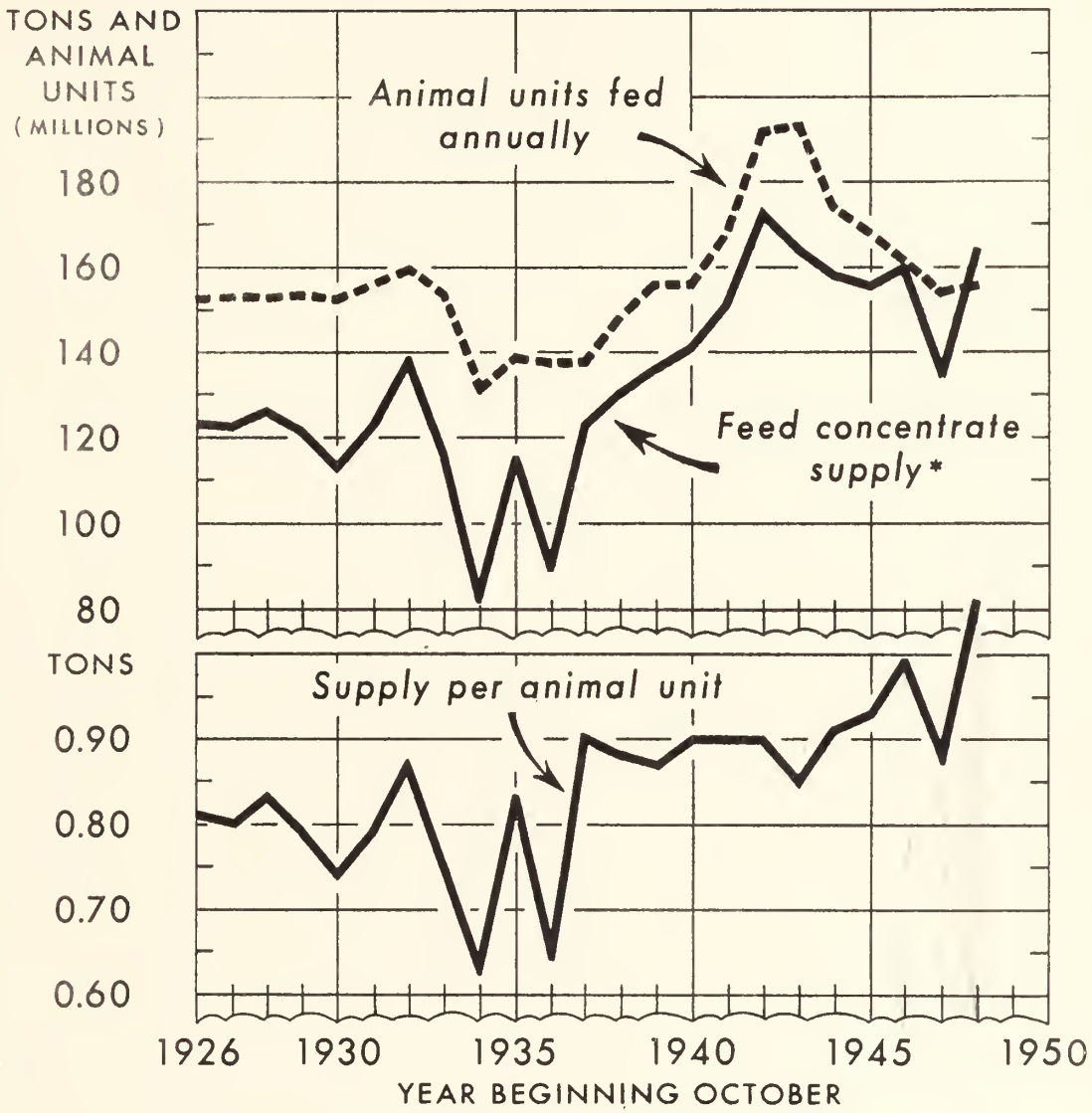
FEED CROPS: PRODUCTION IN THE UNITED STATES, 1920-48



*PRELIMINARY. AUGUST 1 ESTIMATES

U. S. DEPARTMENT OF AGRICULTURE NEG. 43928-X BUREAU OF AGRICULTURAL ECONOMICS

FEED CONCENTRATE SUPPLY, GRAIN-CONSUMING ANIMAL UNITS FED ANNUALLY, AND SUPPLY PER ANIMAL UNIT, 1926-48

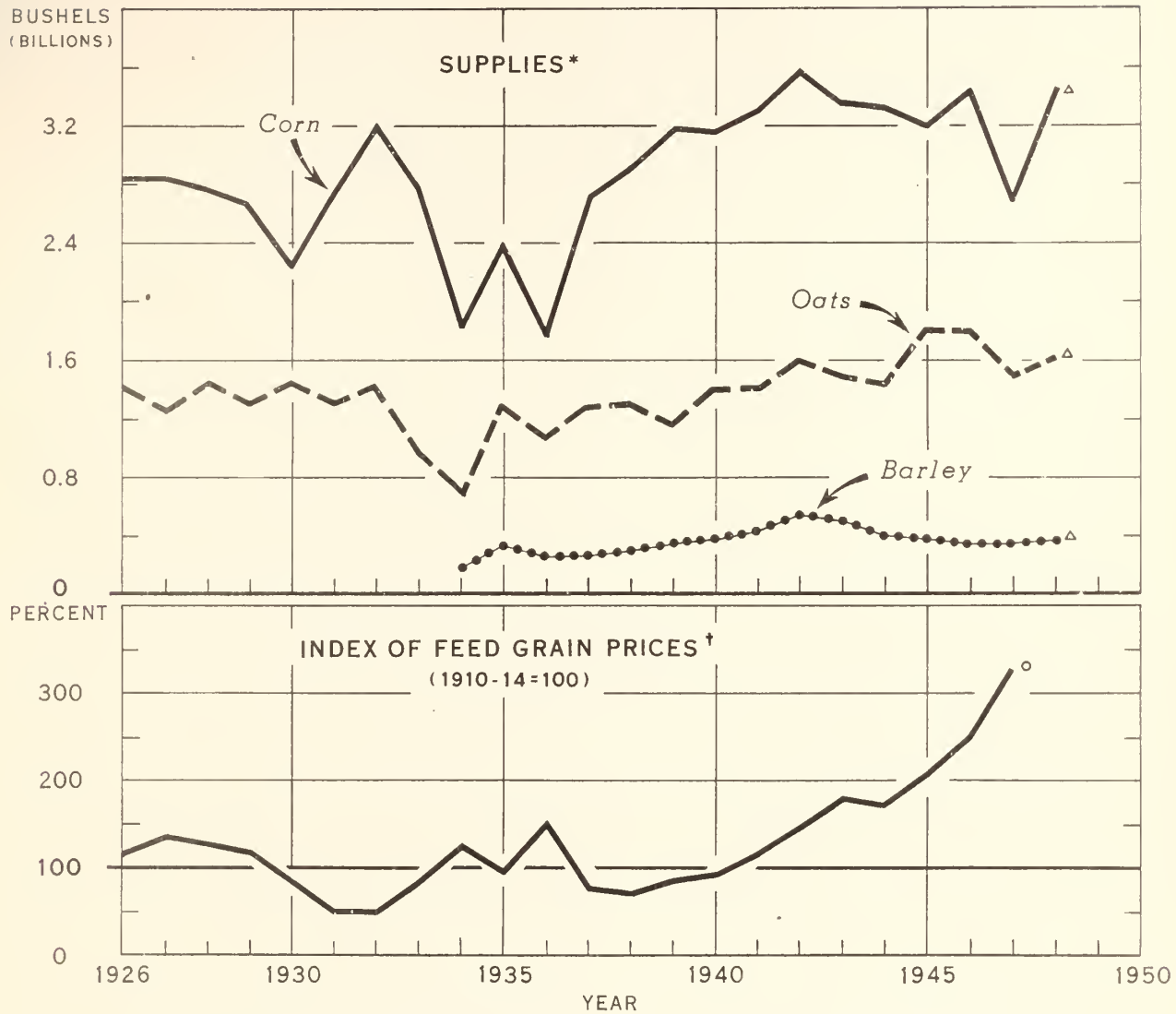


*SUPPLY FOUR FEED GRAINS, PLUS WHEAT, RYE, AND BYPRODUCT FEEDS FED DURING OCTOBER-SEPTEMBER

DATA FOR 1947 ARE PRELIMINARY; FOR 1948, AUGUST 1 INDICATIONS

U. S. DEPARTMENT OF AGRICULTURE NEG.46500A-X BUREAU OF AGRICULTURAL ECONOMICS

FEED GRAINS: SUPPLIES AND INDEX OF PRICES, UNITED STATES, 1926-48



* *PRODUCTION, CARRYOVER (CORN OCT. 1, OATS AND BARLEY JULY 1) AND IMPORTS*

† *PRICES RECEIVED BY FARMERS YEAR BEGINNING OCTOBER*

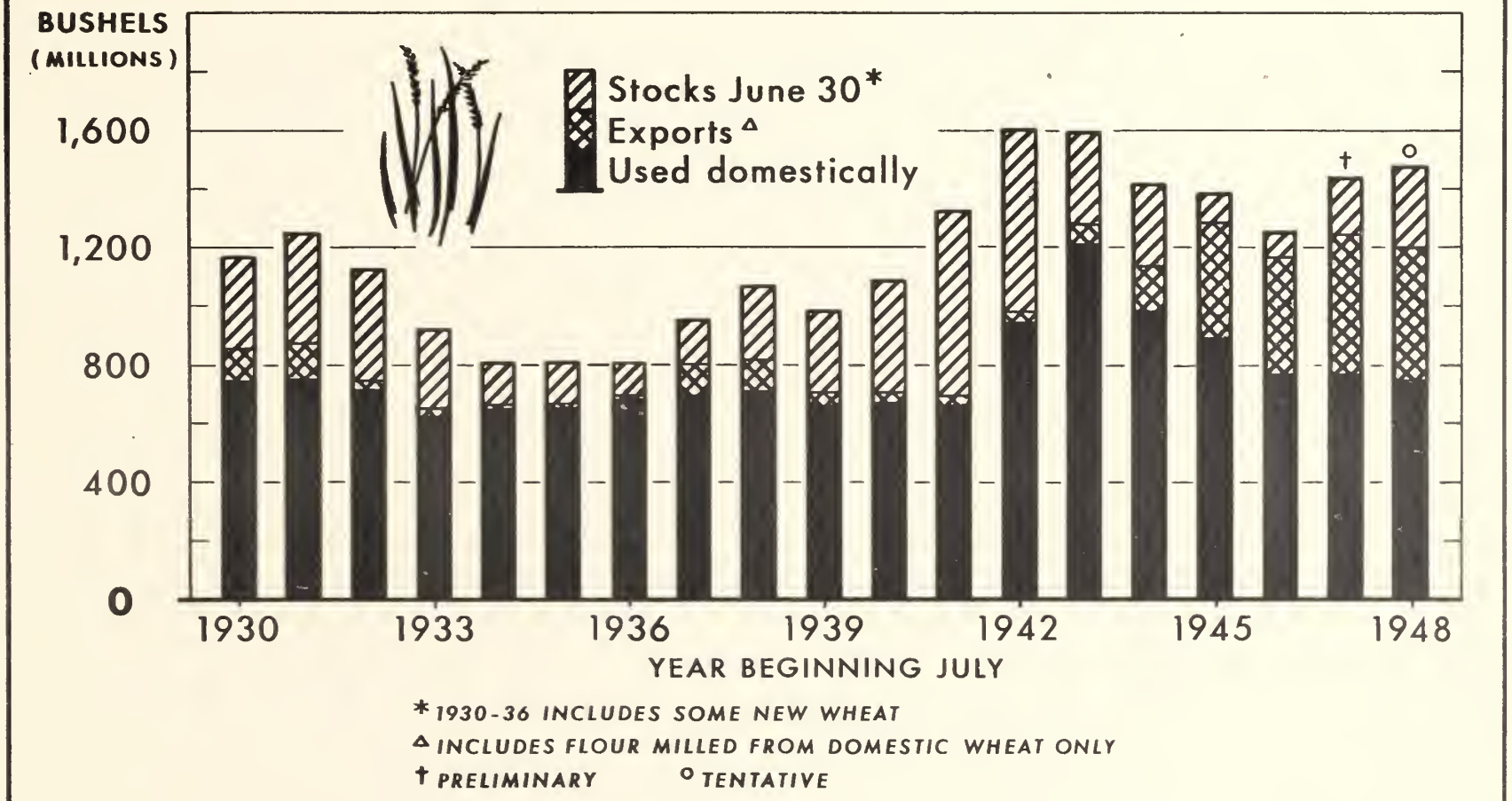
△ *PRELIMINARY ESTIMATES BASED ON INDICATIONS IN JULY*

○ *OCT.-JUNE AVERAGE*

U. S. DEPARTMENT OF AGRICULTURE

NEG. 46803 BUREAU OF AGRICULTURAL ECONOMICS

DISTRIBUTION OF U. S. WHEAT SUPPLY, 1930-48



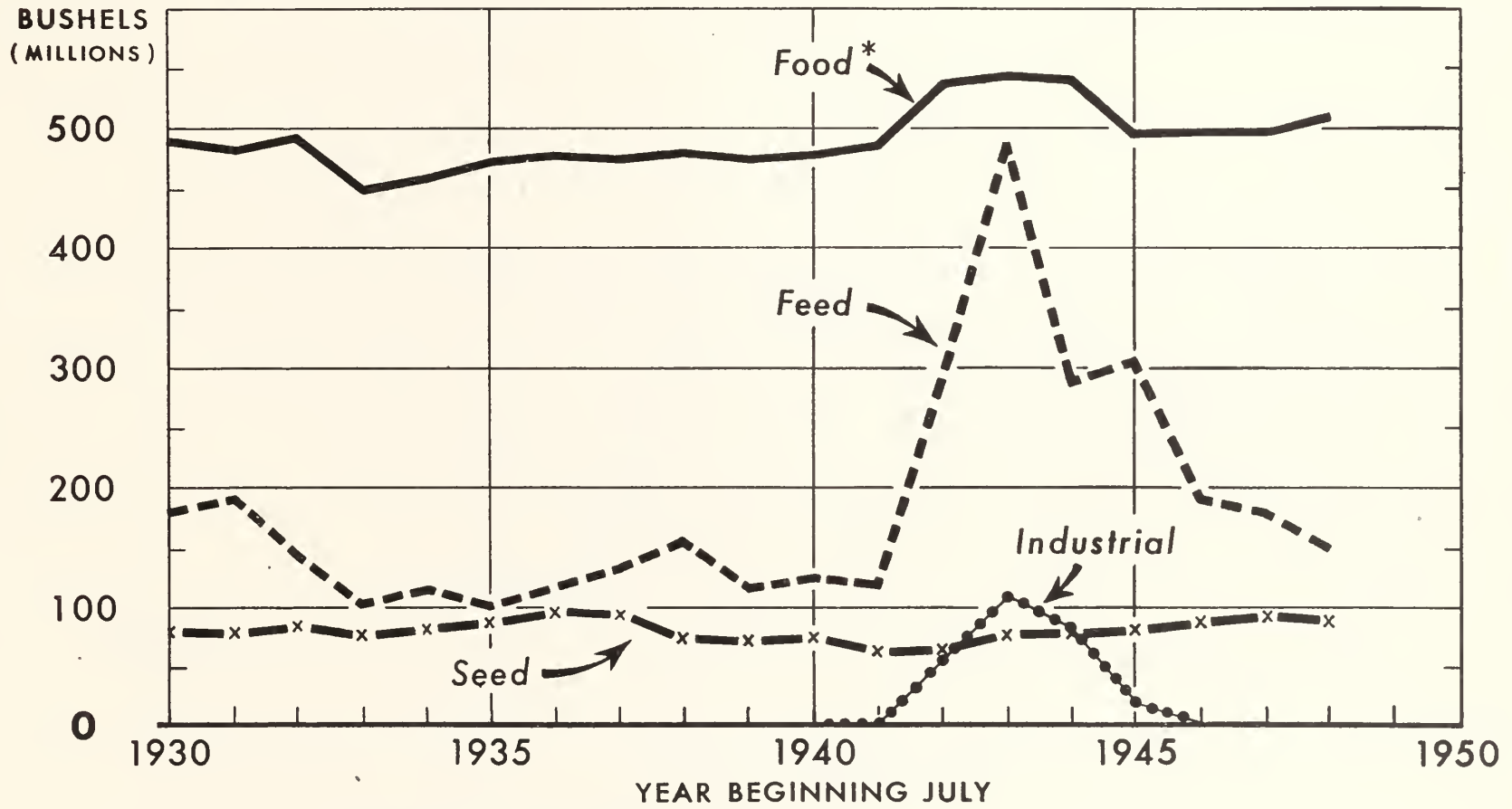
*1930-36 INCLUDES SOME NEW WHEAT

△ INCLUDES FLOUR MILLED FROM DOMESTIC WHEAT ONLY

† PRELIMINARY o TENTATIVE

U. S. DEPARTMENT OF AGRICULTURE NEG. 46051-X BUREAU OF AGRICULTURAL ECONOMICS

DISTRIBUTION OF WHEAT USED DOMESTICALLY, 1930-48



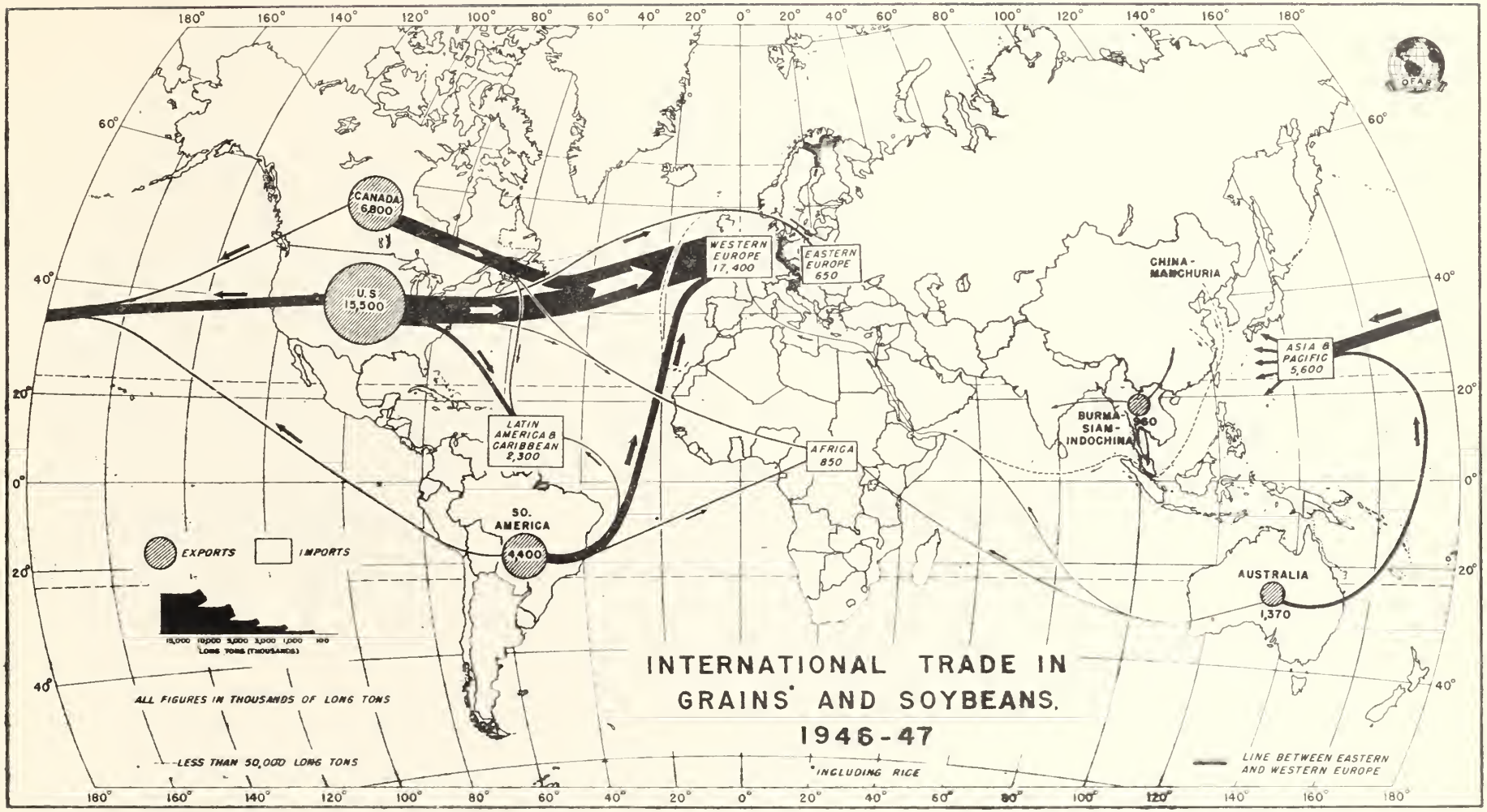
*INCLUDES USE BY MILITARY SERVICES

DATA FOR 1947 ARE PRELIMINARY; FOR 1948, TENTATIVE ESTIMATES

U. S. DEPARTMENT OF AGRICULTURE NEG. 46050-X BUREAU OF AGRICULTURAL ECONOMICS

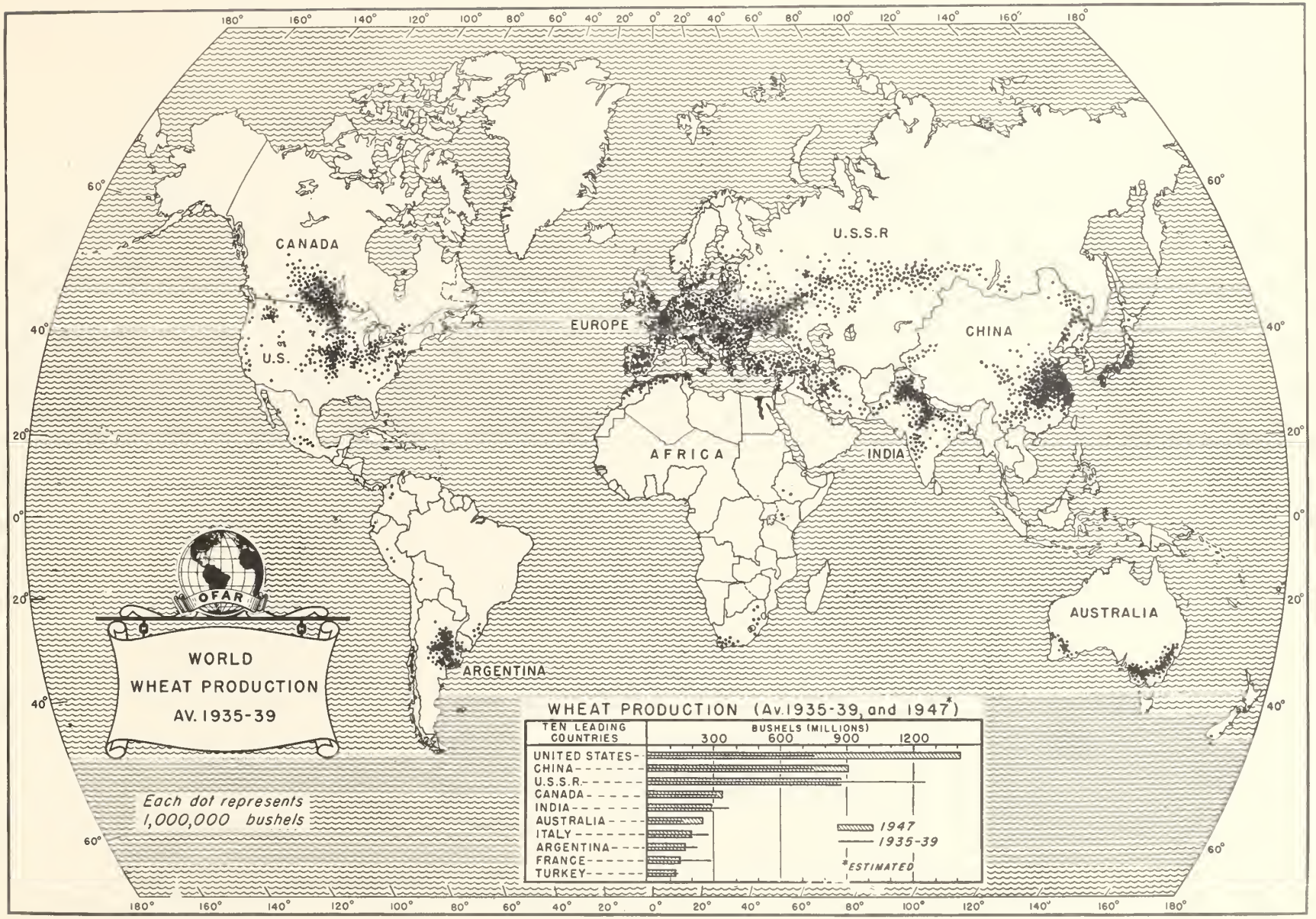
U. S. DEPARTMENT OF AGRICULTURE

NEG. 973-A OFFICE OF FOREIGN AGRICULTURAL RELATIONS



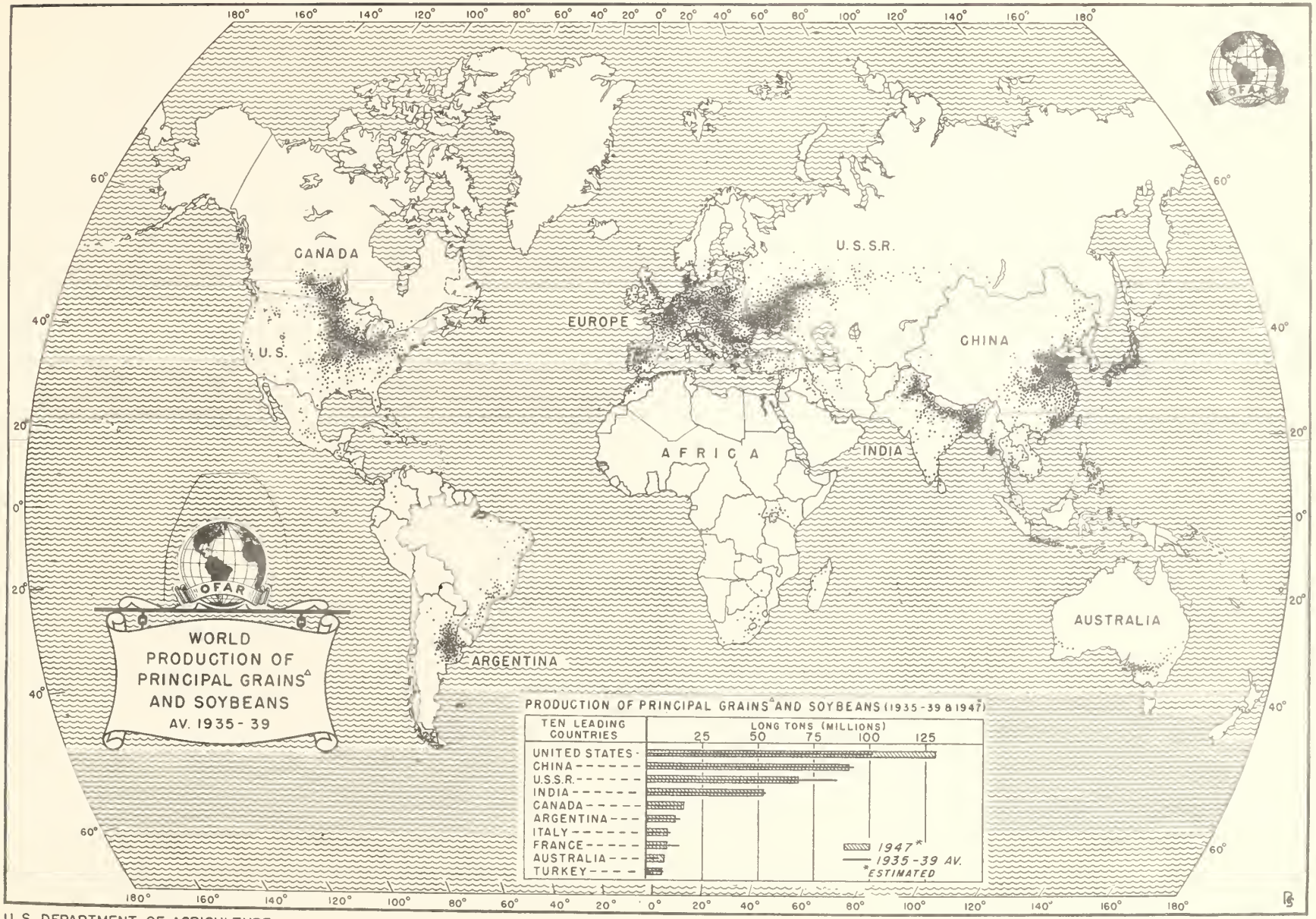
U.S. DEPARTMENT OF AGRICULTURE

NEG. 972 OFFICE OF FOREIGN AGRICULTURAL RELATIONS



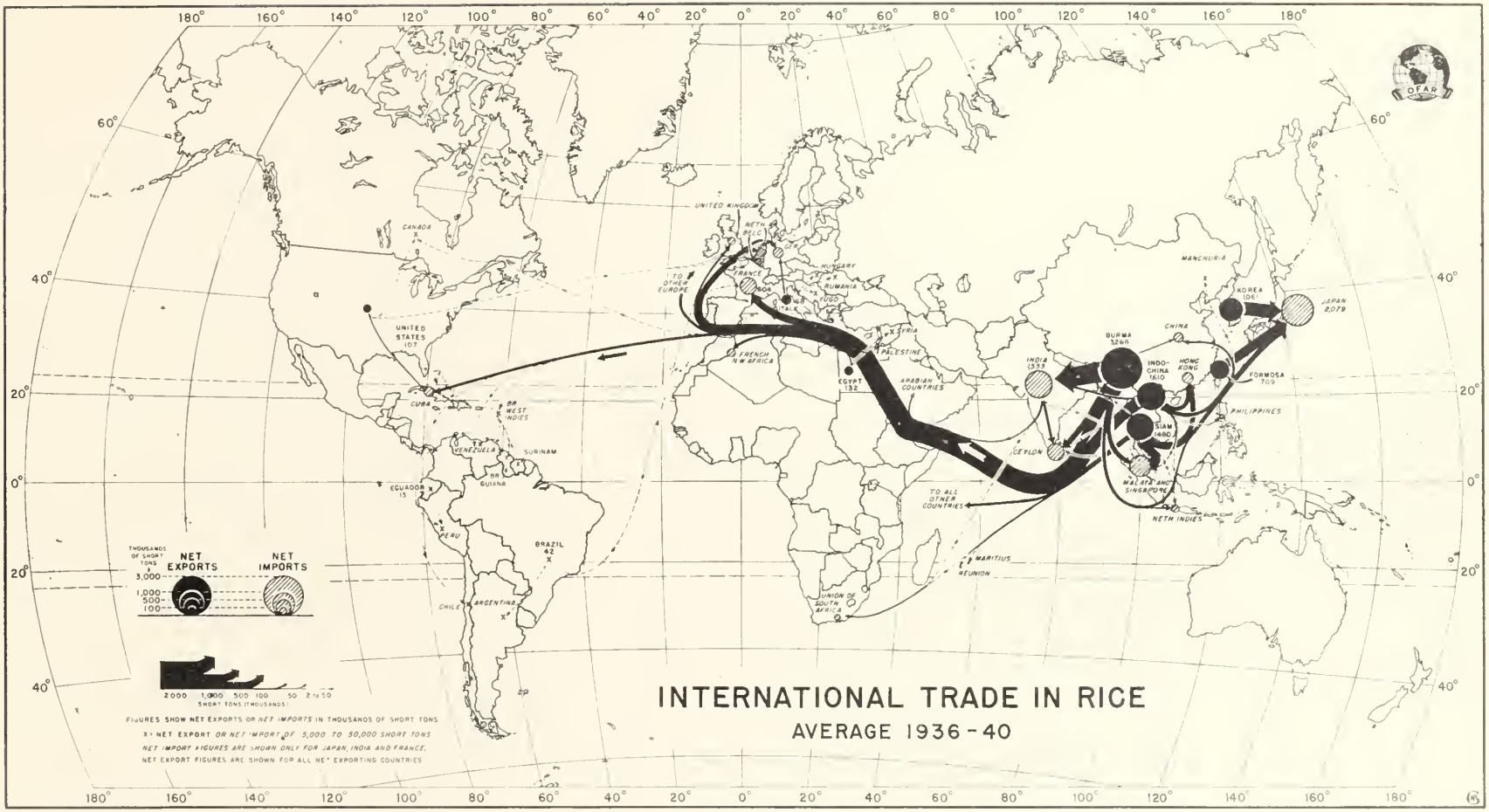
U. S DEPARTMENT OF AGRICULTURE

NEG. 970 OFFICE OF FOREIGN AGRICULTURAL RELATIONS



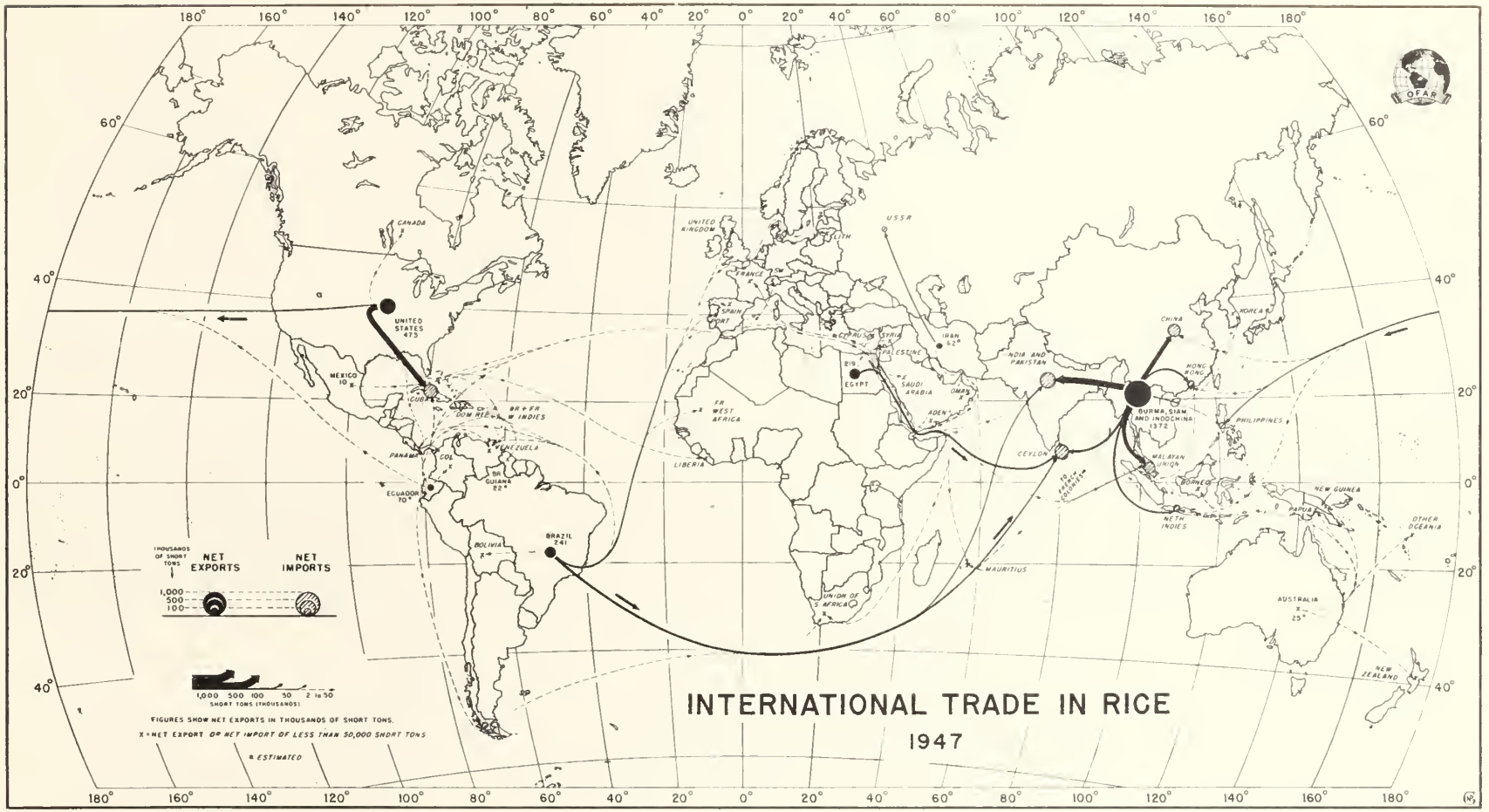
U. S. DEPARTMENT OF AGRICULTURE

NEG. 976 OFFICE OF FOREIGN AGRICULTURAL RELATIONS



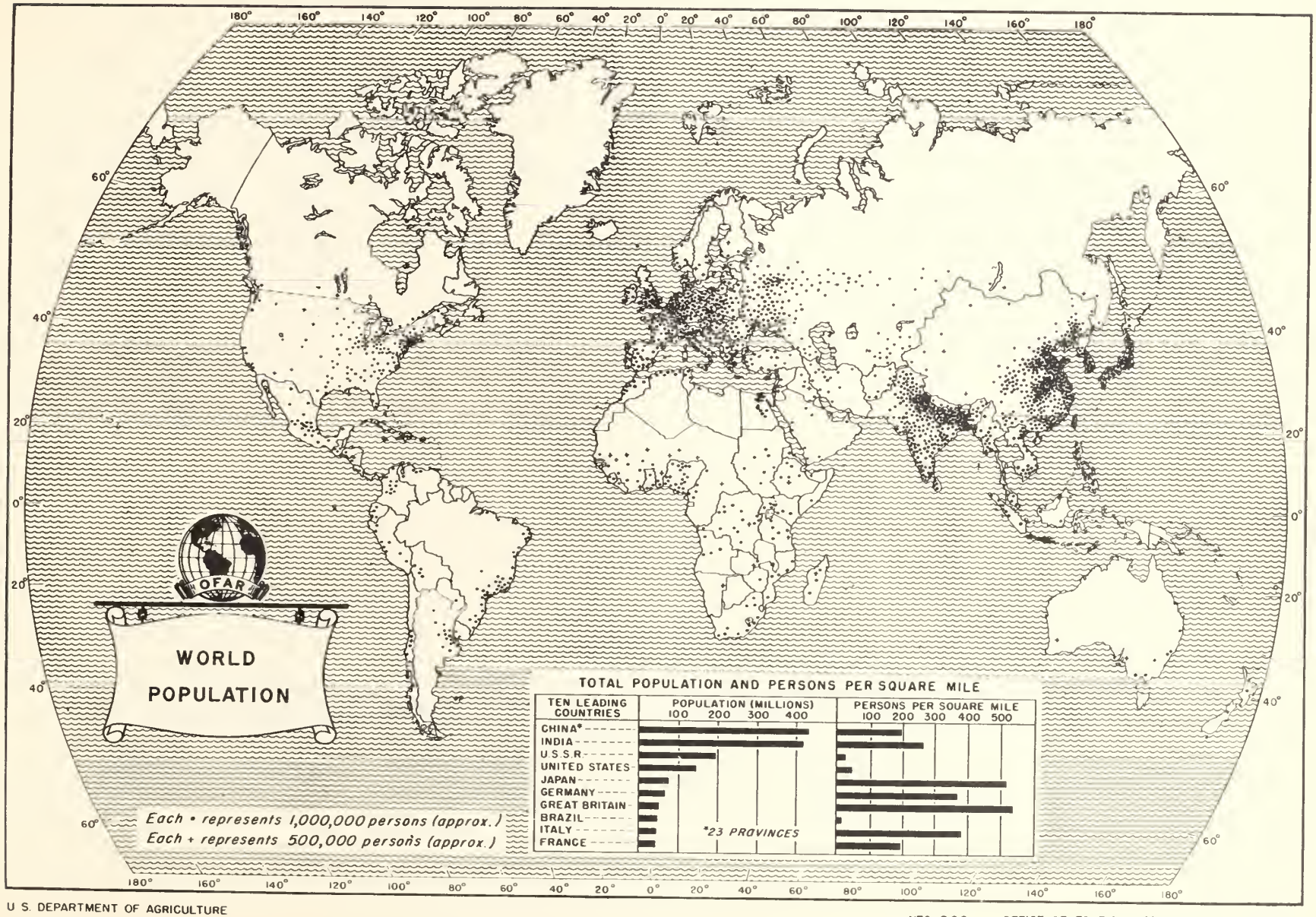
U.S. DEPARTMENT OF AGRICULTURE

NEG. 977 OFFICE OF FOREIGN AGRICULTURAL RELATIONS



U.S. DEPARTMENT OF AGRICULTURE

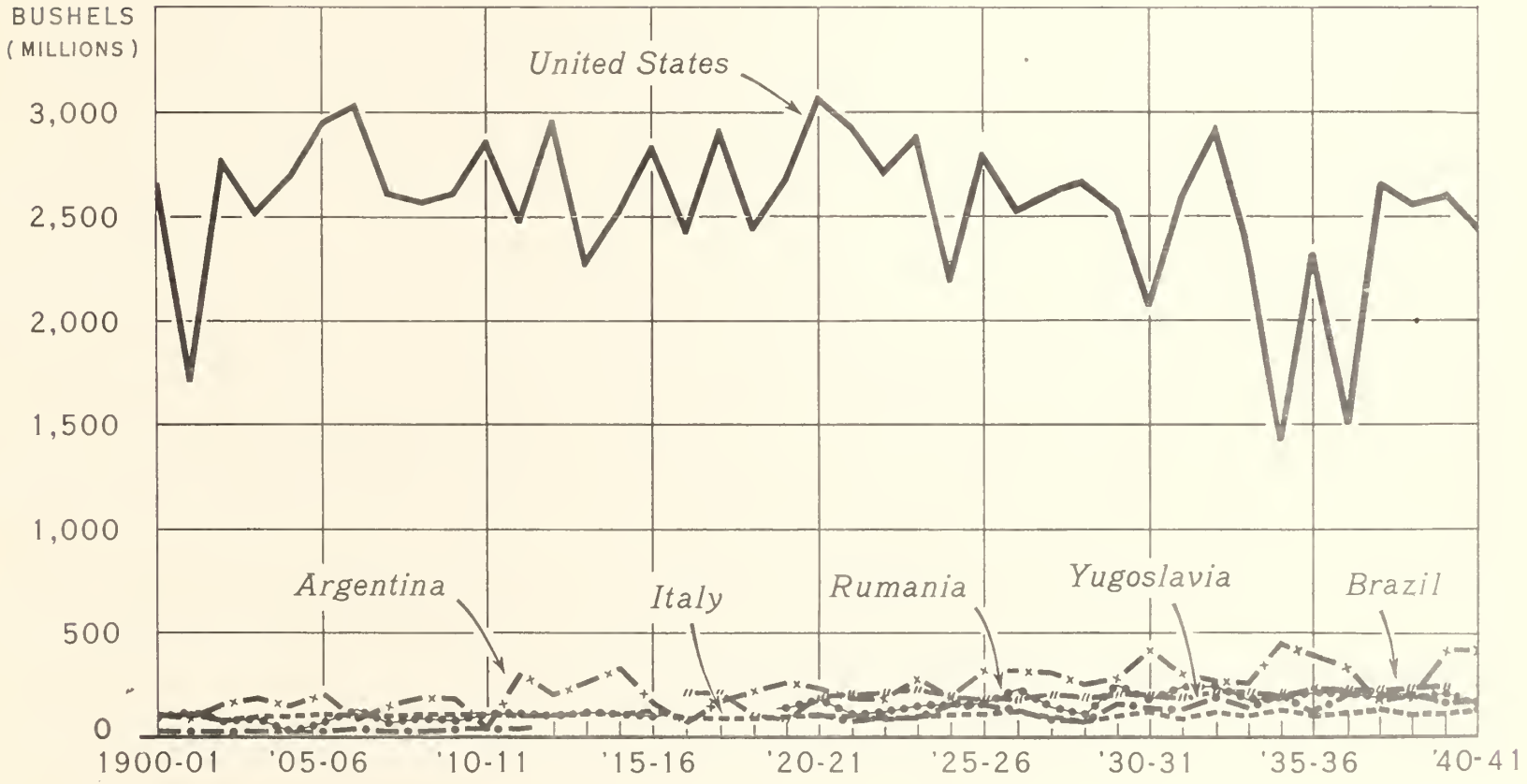
NEG. 1015 OFFICE OF FOREIGN AGRICULTURAL RELATIONS



U. S. DEPARTMENT OF AGRICULTURE

NEG 966 OFFICE OF FOREIGN AGRICULTURAL RELATIONS

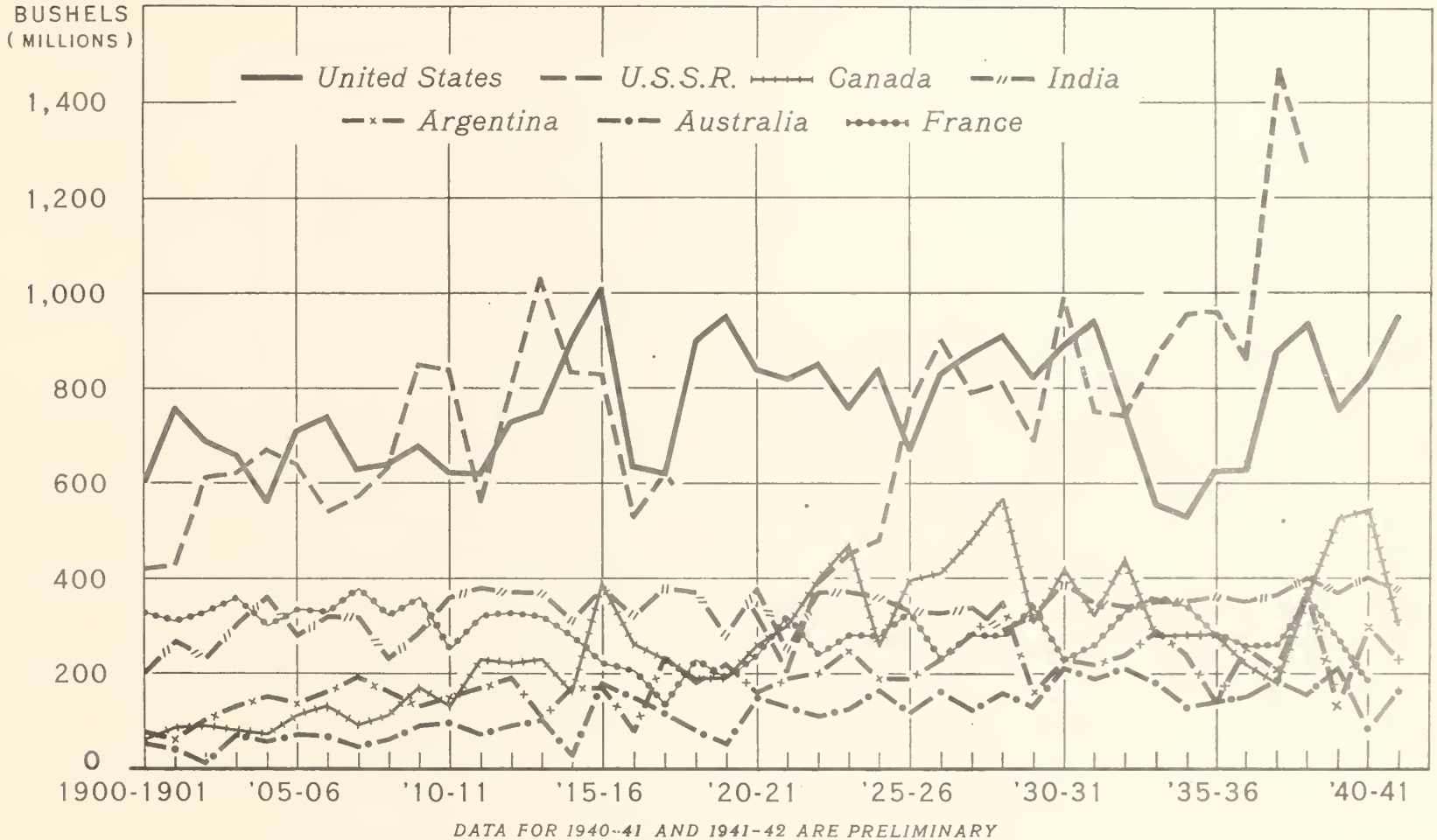
CORN: PRODUCTION IN LEADING COUNTRIES, 1900-1940



U. S. DEPARTMENT OF AGRICULTURE

NEG. 31188 BUREAU OF AGRICULTURAL ECONOMICS

WHEAT PRODUCTION IN LEADING COUNTRIES, 1900–1941



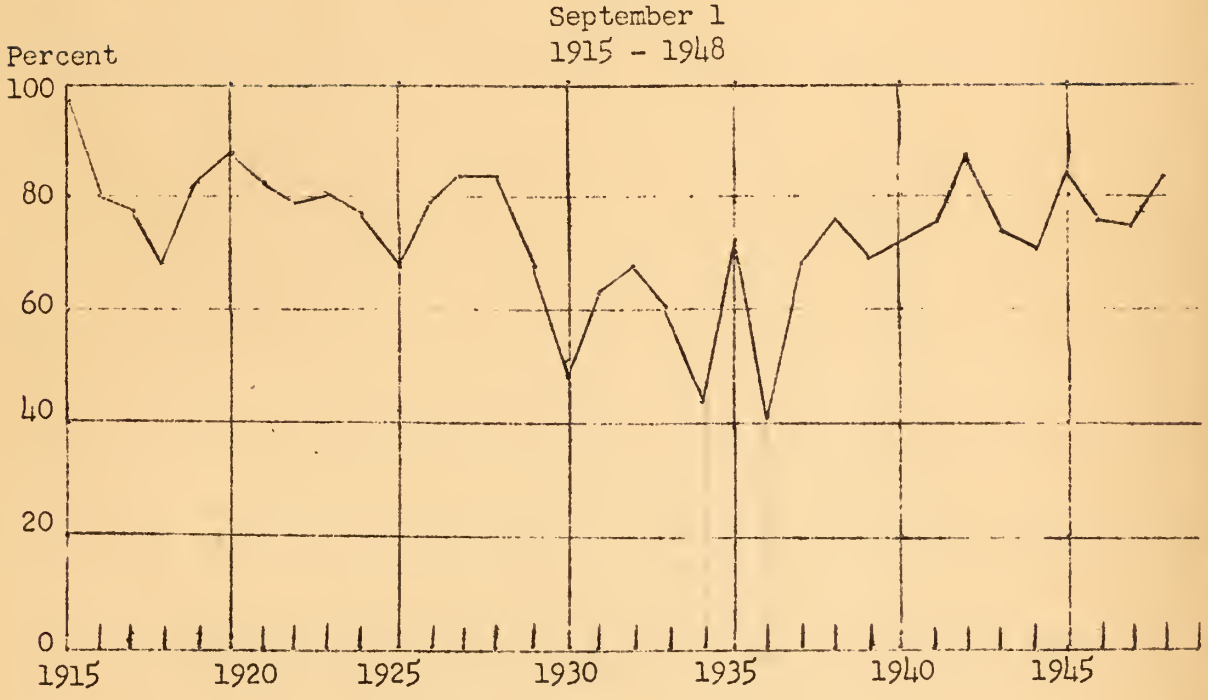
DATA FOR 1940-41 AND 1941-42 ARE PRELIMINARY

U. S. DEPARTMENT OF AGRICULTURE

NEG. 31187 BUREAU OF AGRICULTURAL ECONOMICS

UNITED STATES

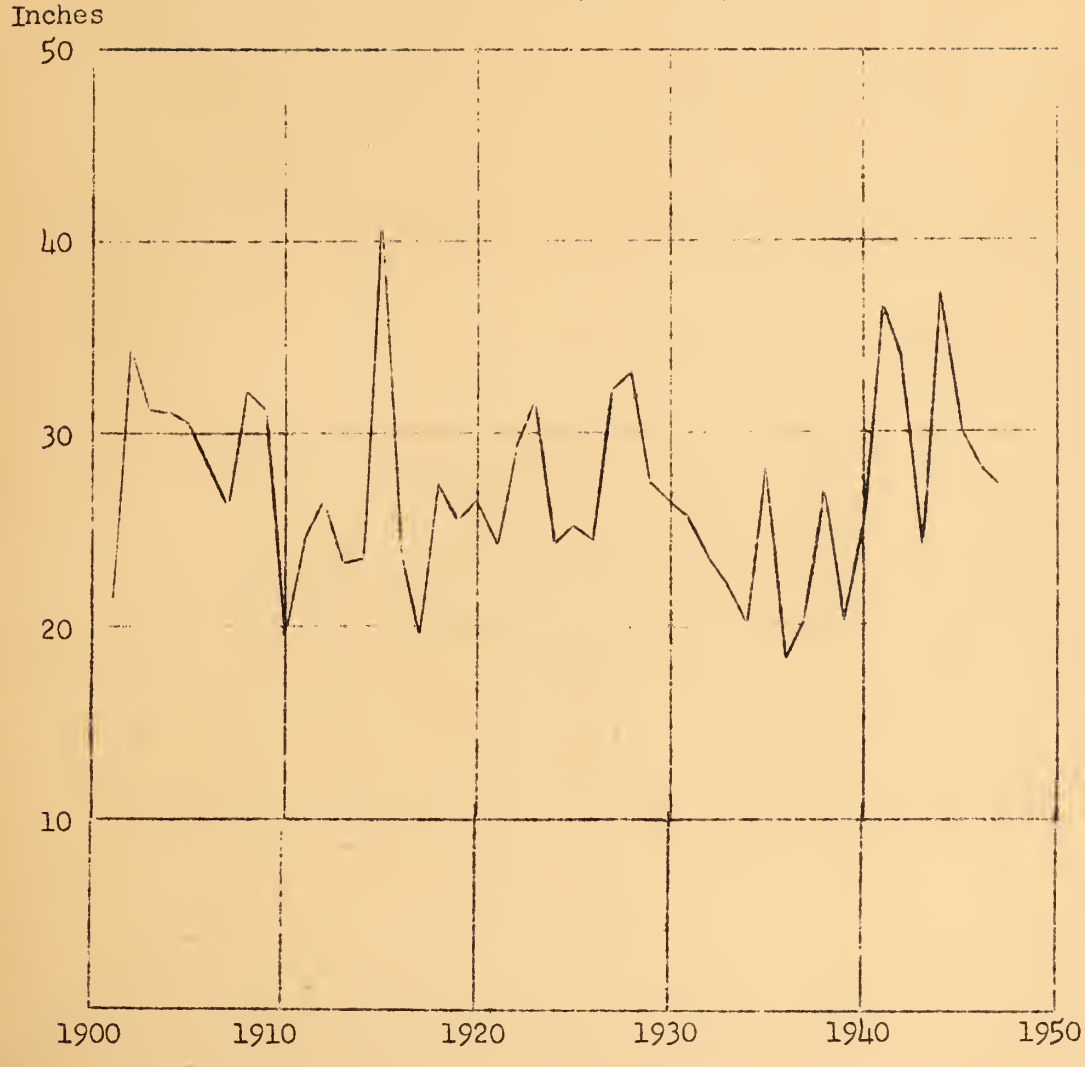
Pasture Conditions *



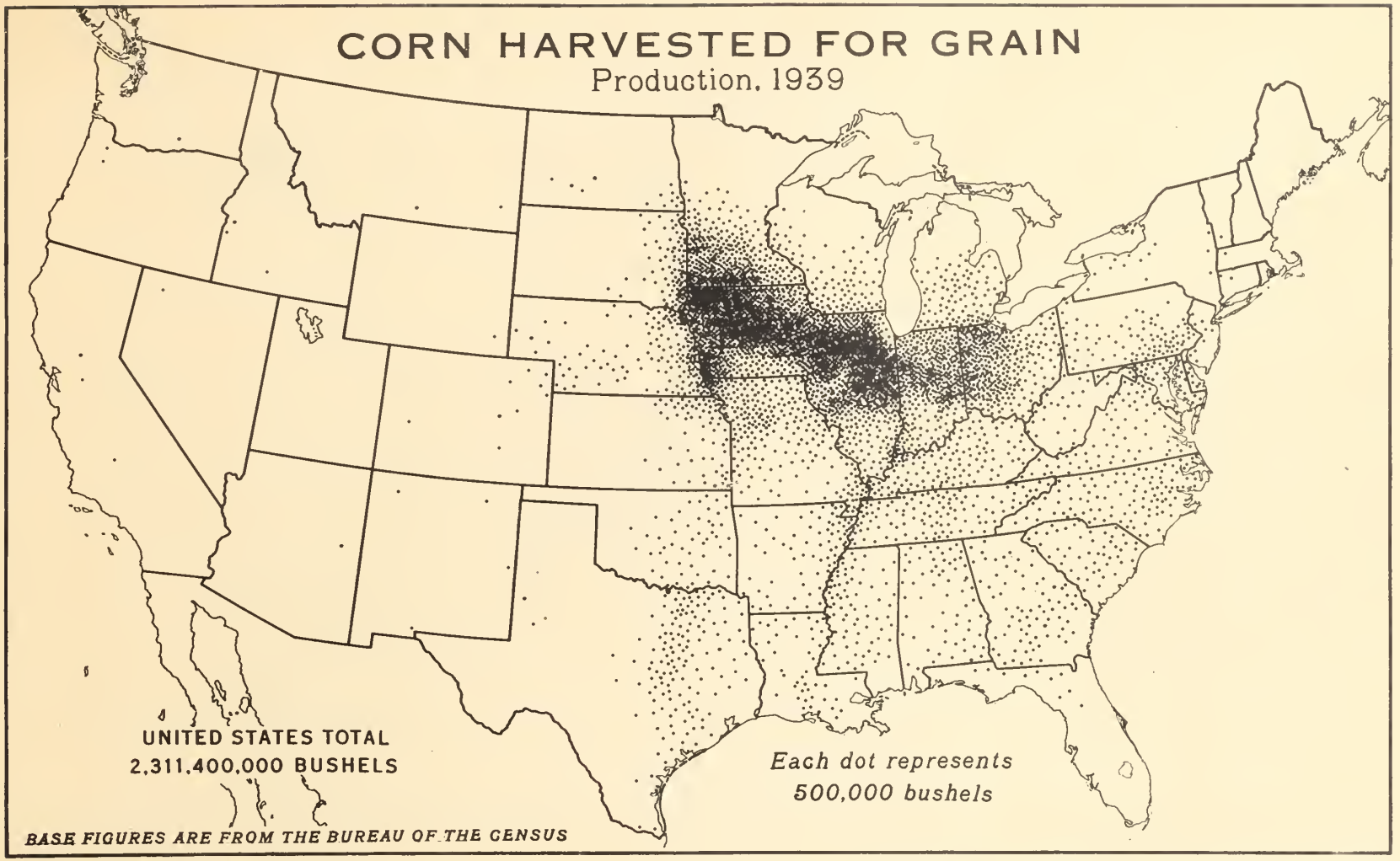
* BAE Estimates

PMA /USDA
Price Support and Foreign
Supply Branch
8/24/1948

AVERAGE ANNUAL RAINFALL IN KANSAS
1901 - 1947

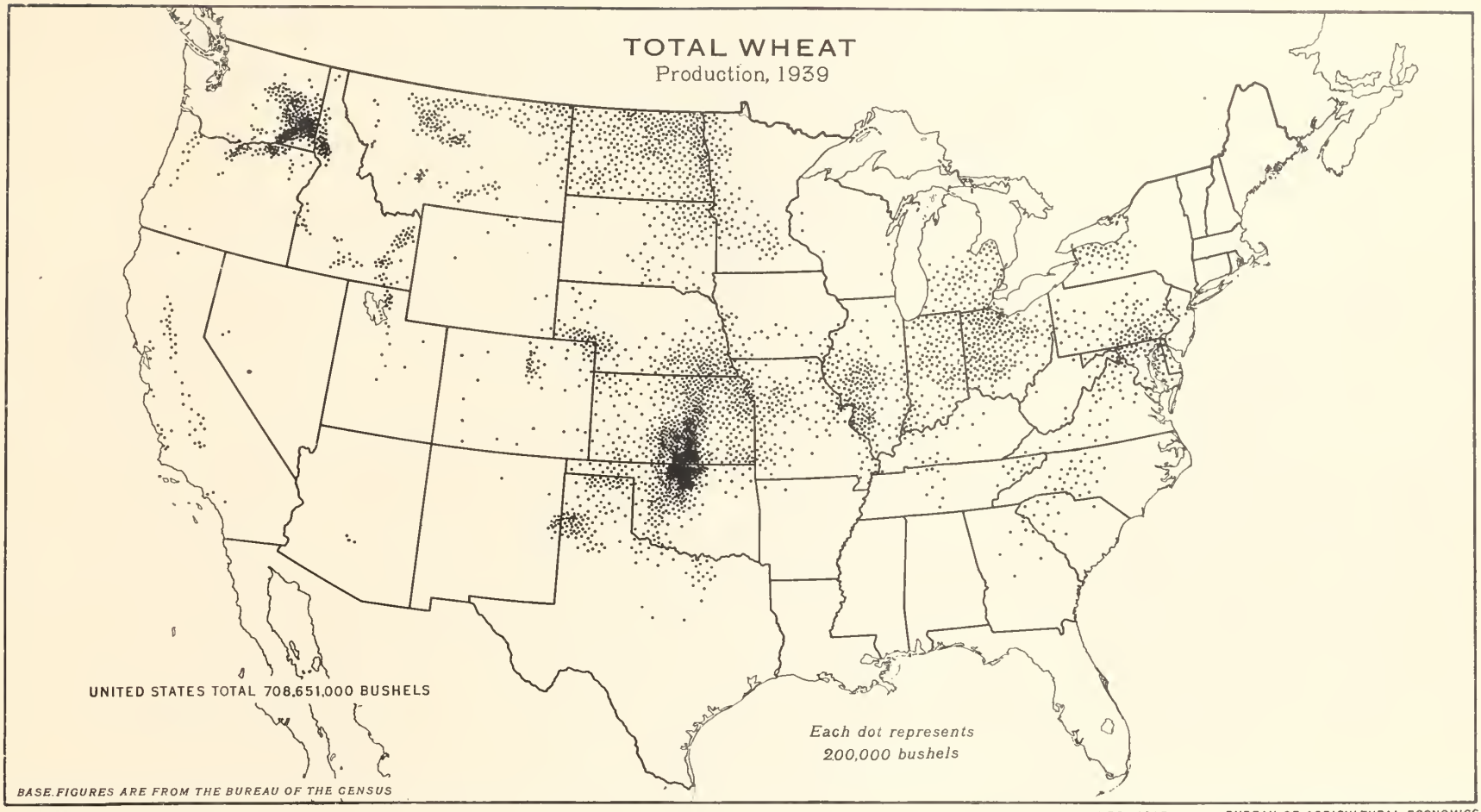


USDA/PMA
Price Support and Foreign Supply
August 24, 1948



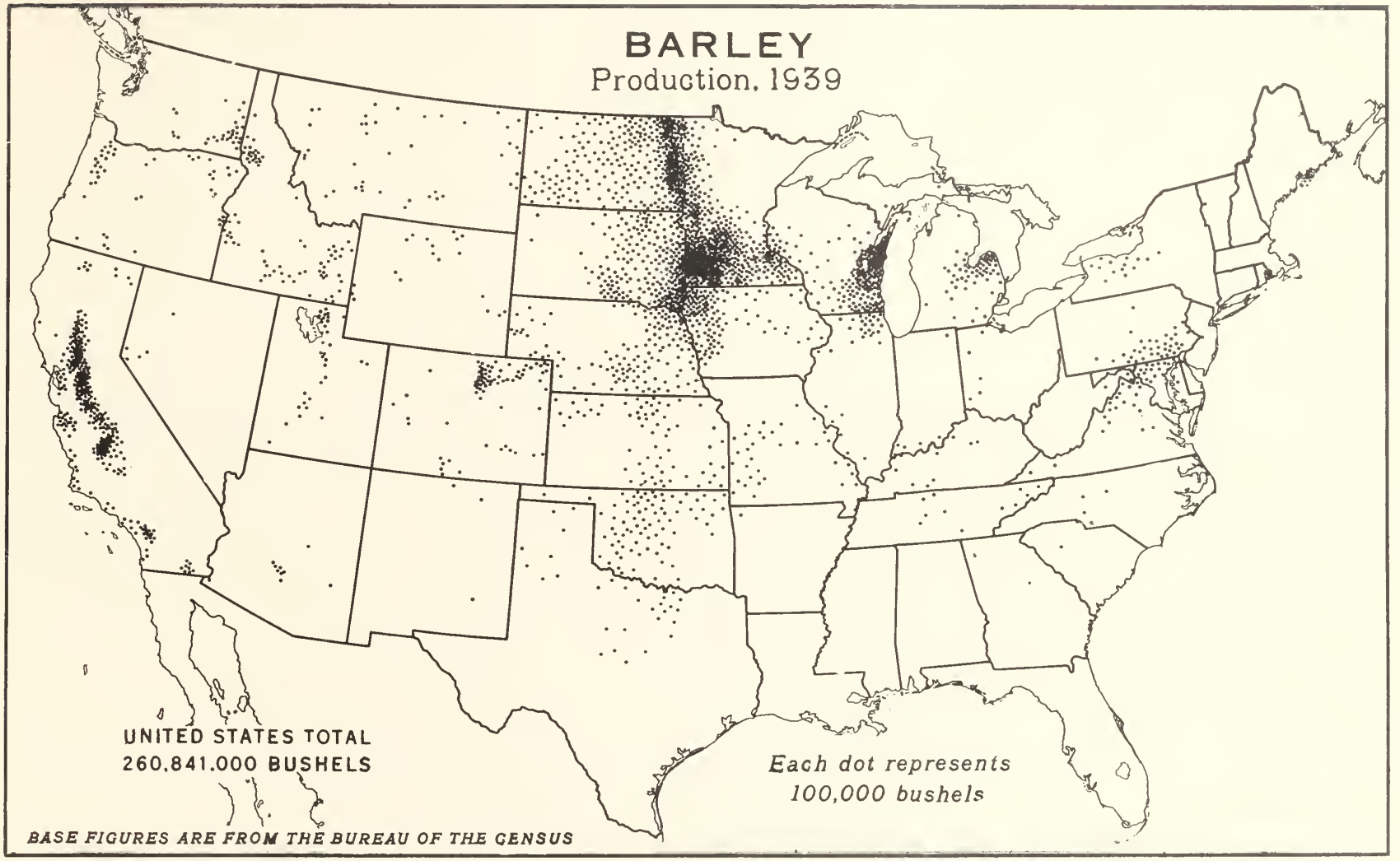
U.S. DEPARTMENT OF AGRICULTURE

NEG. 39846 BUREAU OF AGRICULTURAL ECONOMICS



U. S. DEPARTMENT OF AGRICULTURE

NEG. 39978 BUREAU OF AGRICULTURAL ECONOMICS

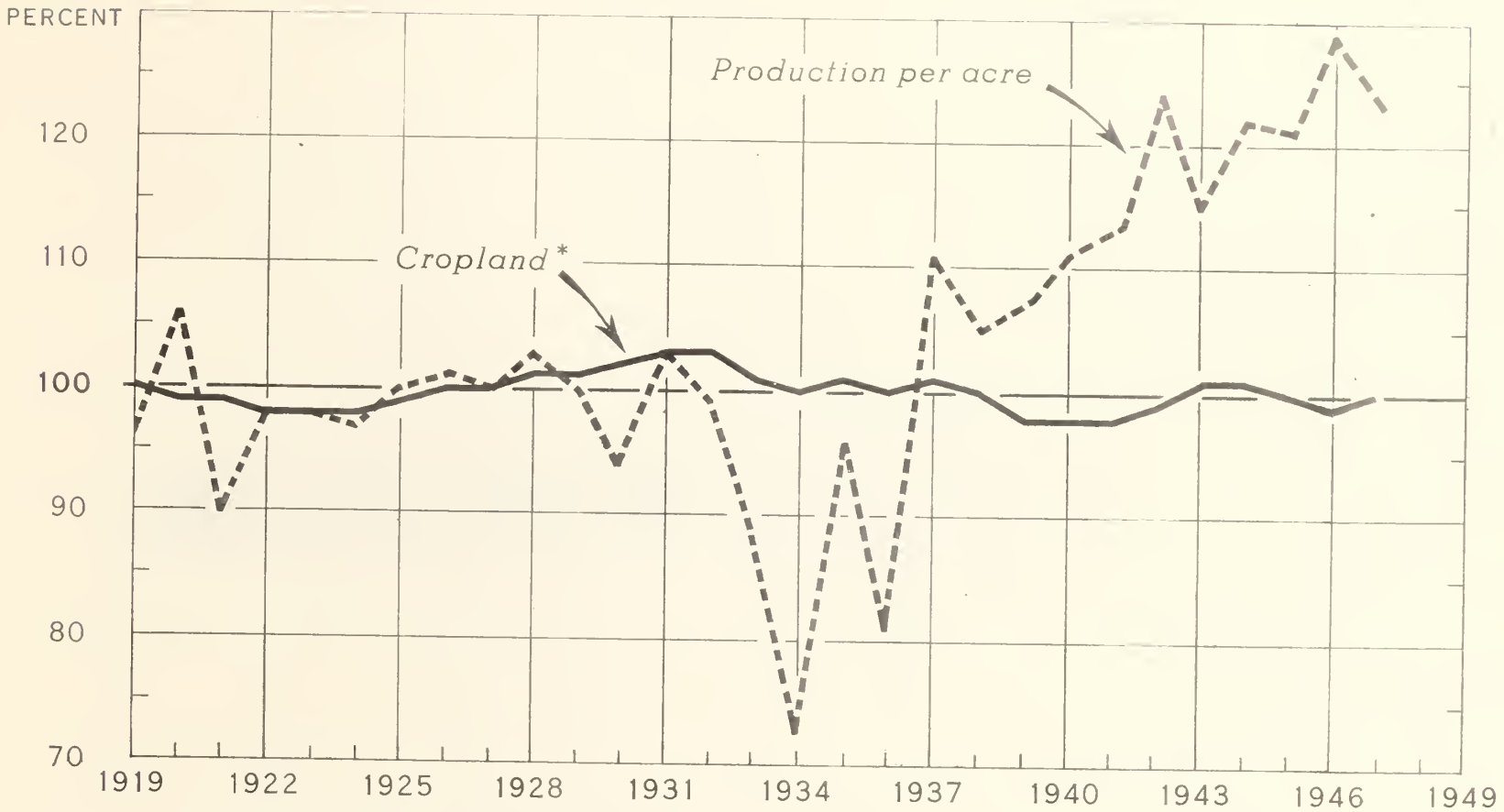


U. S. DEPARTMENT OF AGRICULTURE

NEG. 39853 BUREAU OF AGRICULTURAL ECONOMICS

TOTAL CROPLAND, AND CROP PRODUCTION PER ACRE, UNITED STATES, 1919-47

INDEX NUMBERS (1935-39=100)



DATA FOR 1946 AND 1947 ARE PRELIMINARY

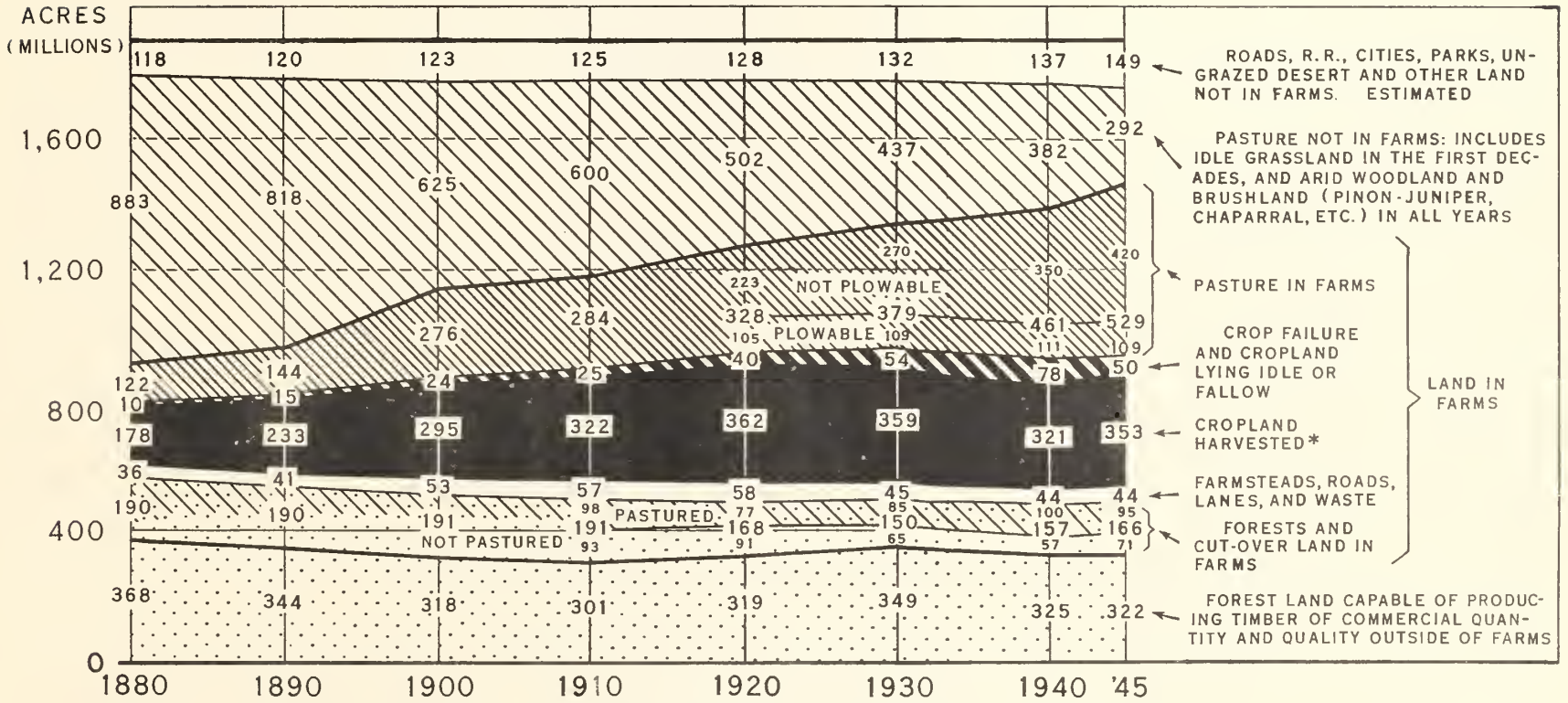
** TOTAL CROPLAND IS THE SUM OF THE ESTIMATED ACREAGE OF LAND FROM WHICH ONE OR MORE CROPS WERE HARVESTED PLUS ESTIMATED CROP FAILURE AND SUMMER FALLOW ACREAGE.*

U. S. DEPARTMENT OF AGRICULTURE

NEG. 45549 BUREAU OF AGRICULTURAL ECONOMICS

THE TREND IN LAND UTILIZATION

United States, 1880-1945

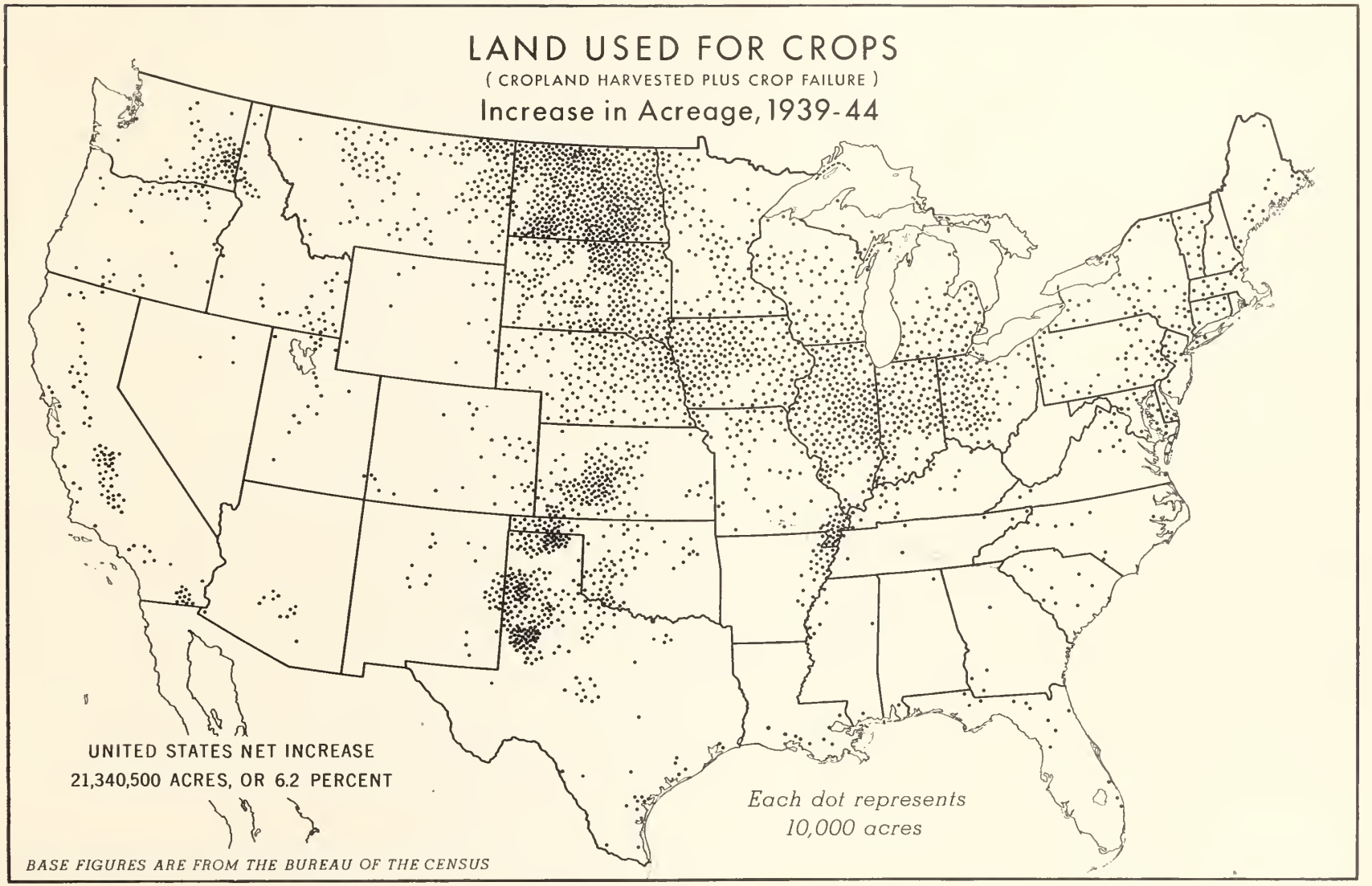


FIGURES PRIOR TO 1930 ARE MOSTLY ESTIMATES BASED ON THE CENSUS

**CROPLAND ACREAGES ARE FOR THE YEAR PRECEDING THE DATE OF THE CENSUS*

U. S. DEPARTMENT OF AGRICULTURE

NEG. 19123 BUREAU OF AGRICULTURAL ECONOMICS



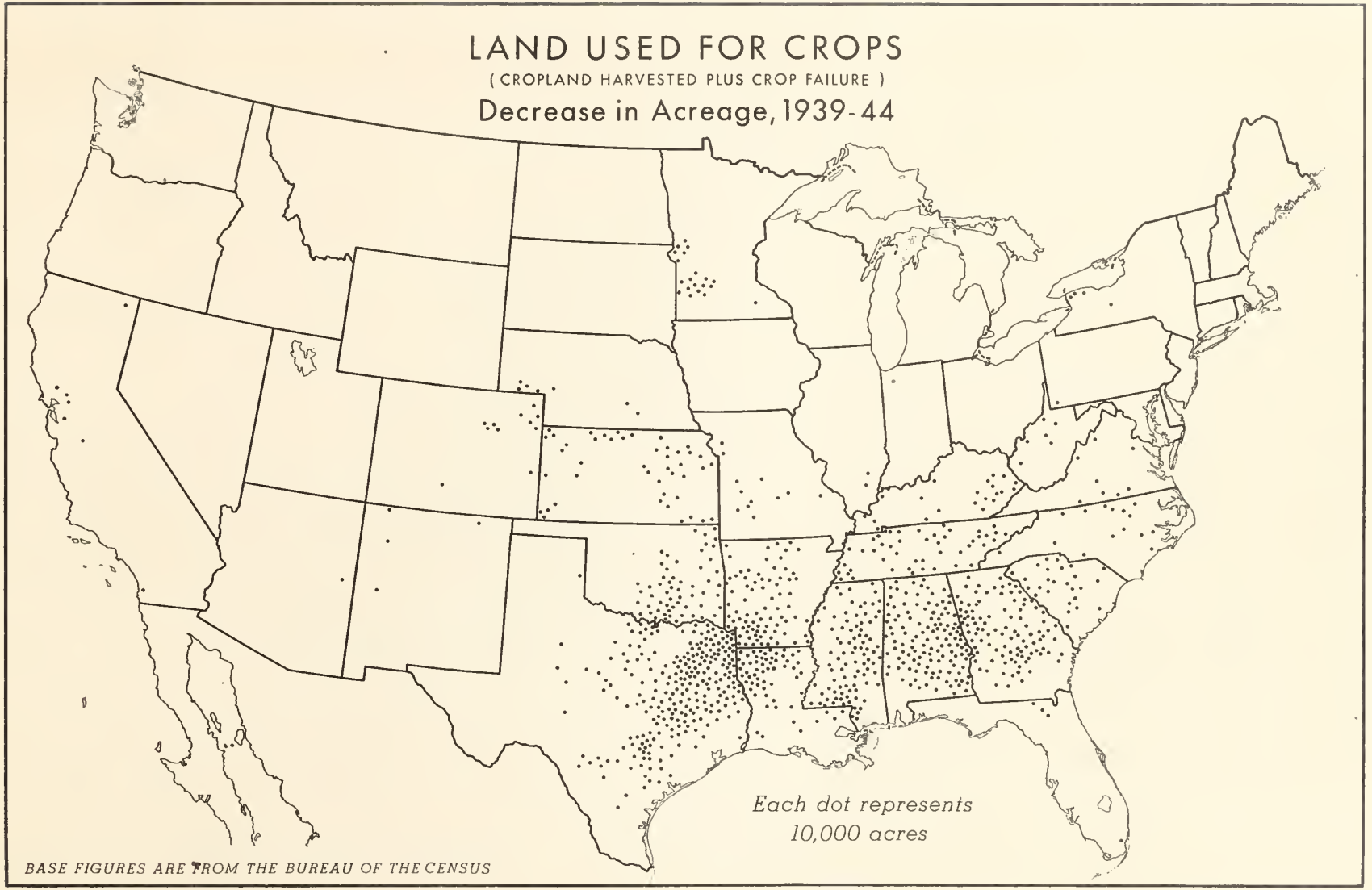
U. S. DEPARTMENT OF AGRICULTURE

NEG. 46326 BUREAU OF AGRICULTURAL ECONOMICS

LAND USED FOR CROPS

(CROPLAND HARVESTED PLUS CROP FAILURE)

Decrease in Acreage, 1939-44



BASE FIGURES ARE FROM THE BUREAU OF THE CENSUS

U. S. DEPARTMENT OF AGRICULTURE

NEG. 46327 BUREAU OF AGRICULTURAL ECONOMICS

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Author BAE Feed Situation (corn, oats, barley, sorghum grains, oilcakes, by-product feeds, relation to livestock)

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